



08 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,057	0.0 %	8.9 %
BSE SENSEX	32,274	(0.2) %	7.9 %
CNX BANK	24,906	0.0 %	15.6 %
CNX MIDCAP	18,570	0.0 %	7.1 %
CNX SMALLCAP	7,786	0.0 %	10.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,118	0.1 %	11.2 %
S&P 500	2,481	0.2 %	9.9 %
FTSE 100	7,532	0.3 %	4.9 %
HANG SENG	27,690	0.5 %	25.0 %
NIKKEI	20,056	0.5 %	2.4 %
SHANGHAI COMPOSITE	3,279	0.5 %	4.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.81	0.2 %	(5.4) %
EUR/USD	1.18	(0.5) %	11.4 %
GBP/USD	1.30	(0.7) %	6.1 %
USD/JPY	110.62	0.5 %	(4.6) %
USD/AUD	1.26	0.3 %	(7.8) %
USD/SGD	1.36	0.2 %	(4.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	1.1 %	(5.3) %
Gold(INR/10g)	28,554	0.0 %	2.7 %
Gold Comex(USD/oz)	1,265	(0.7) %	9.3 %
SILVER(INR/1Kg)	37,966	0.0 %	(2.5) %
Aluminium(USD/MT)	1,890	(0.1) %	11.0 %
Copper(USD/MT)	6,330	0.6 %	13.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	0.0 %	(0.2) %

Global Economy: The Fed said consumer credit rose by \$12.4 billion in June after jumping by \$18.3 billion in May. Non-revolving credit such as student loans and car loans increased by \$8.2 billion in June after climbing by \$11.5 billion in May. Revolving credit, which largely reflects credit card debt, edged up by \$4.1 billion in June after rising by \$6.9 billion in the previous month. The Fed said consumer credit increased by an annual rate of 3.9% in June, as revolving and non-revolving credit rose by 4.9% and 3.5%, respectively. Eurozone investor confidence declined for the second straight month in August to the lowest level in three months, survey results from think tank Sentix showed Monday. The investor confidence index dropped to a 3-month low of 27.7 in August from 28.3 in July. Germany's industrial production dropped unexpectedly in June, data from Destatis revealed. Industrial output slipped 1.1% month-on-month in June, in contrast to a 1.2% rise seen in May. Excluding energy and construction, production in industry dropped 1.4%.

Global Equities: US stocks moved modestly higher during trading on Monday, adding to the small gains posted last Friday. With the upward move on the day, the Dow climbed to a new record closing high for the ninth consecutive session.

Indian Economy: The GST Council considered the issue of cess leviable on motor vehicles in and recommended that Central Government may move legislative amendments required for increasing the maximum ceiling of cess leviable on motor vehicles falling under headings 8702 and 8703 including SUVs, to 25% instead of present 15%. However, the decision on when to raise the actual cess leviable on the same will be taken by the GST Council in due course. It was noted that after introduction of GST, the total tax incidence on motor vehicles [GST + Compensation Cess] has come down vis-a-vis the total tax incidence in pre-GST regime.

Equity Markets: Key benchmark indices registered modest losses on first trading day of the week despite firmness in most of the global stocks. Trading for the week kicked-off on a positive note as domestic stocks drifted higher in early trade in sync with Asian stocks. Volatility hit bourses in morning trade as indices regained positive zone soon after erasing early gains to hit intraday low in negative zone. Stocks extended gains and hit fresh intraday high in mid-morning trade.

Corporate News: On a consolidated basis, Tata Steel reported net profit of Rs 921.09 crore in Q1 June 2017 compared with net loss of Rs 3183.07 crore in Q1 June 2016. Net sales rose 18.9% to Rs 29386.76 crore in Q1 June 2017 over Q1 June 2016. Polar Consulting Services' consolidated net profit fell 8.6% to Rs 30.2 crore on 2.4% decline in net revenue to Rs 554.90 crore in Q1 June 2017 over Q4 March 2017. The announcement was made after market hours yesterday, 7 August 2017. Revenue declined on the backdrop of currency appreciation. Profit declined due to lower operating profit and unfavorable currency movements. Profit was impacted due to proactive hiring and account level investments made for supporting future growth. Merck's net profit fell 11.65% to Rs 20.12 crore on 4.33% decline in total income to Rs 271.07 crore in Q1 June 2017 over Q1 June 2016.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(136.4)	(45.6)	23.3
MF(INR cr)	(25.3)	214.6	466.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	28,271	29,480	30,289
F&O(INR cr)	298,101	549,240	548,414

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.0	10.2	11.1
NSE VIX	11.9	11.8	11.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,906	0.3 %	15.6 %	Energy	13,267	0.5 %	12.3 %
IT	10,679	(0.7) %	0.8 %	Pharma	9,229	(0.3) %	(12.1) %
Metals	3,341	1.2 %	7.6 %	Finance	10,199	0.6 %	15.6 %
Auto	11,159	0.2 %	12.5 %	PSU	3,657	1.5 %	3.7 %
FMCG	25,609	0.2 %	8.3 %	Real Estate	285	1.6 %	30.1 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Power Fin.	137	6.4 %	(7.4) %	Sun TV Net	755	(4.0) %	(5.1) %
H P C L	458	5.9 %	32.5 %	Bharti Inf	398	(2.1) %	20.7 %
Britannia	4,108	4.9 %	21.1 %	Tata Motor	250	(1.8) %	(11.0) %
Bajaj Fin.	1,798	4.3 %	52.2 %	NTPC	174	(1.6) %	6.0 %
Tata Steel	600	4.2 %	23.5 %	Infosys	968	(1.6) %	(4.0) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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