



08 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,956	0.3 %	7.8 %
BSE SENSEX	31,663	0.0 %	6.1 %
CNX BANK	24,353	0.2 %	13.0 %
CNX MIDCAP	18,708	0.5 %	7.9 %
CNX SMALLCAP	7,963	0.4 %	12.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,785	(0.1) %	9.6 %
S&P 500	2,465	(0.0) %	9.2 %
FTSE 100	7,397	0.6 %	3.1 %
HANG SENG	27,523	(0.3) %	24.3 %
NIKKEI	19,397	0.2 %	(1.0) %
SHANGHAI COMPOSITE	3,366	(0.6) %	7.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.05	(0.1) %	(5.0) %
EUR/USD	1.20	0.8 %	13.4 %
GBP/USD	1.31	0.4 %	6.6 %
USD/JPY	108.40	(0.6) %	(6.5) %
USD/AUD	1.24	(0.8) %	(9.3) %
USD/SGD	1.34	(0.6) %	(6.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(0.1) %	(6.2) %
Gold(INR/10g)	30,164	(0.1) %	8.5 %
Gold Comex(USD/oz)	1,353	1.1 %	17.0 %
SILVER(INR/1Kg)	40,645	(0.2) %	4.4 %
Aluminium(USD/MT)	2,075	0.3 %	21.9 %
Copper(USD/MT)	6,843	(0.3) %	22.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.0	(0.1) %	(0.4) %

Global Economy: A report released by the Labor Department on Thursday showed US labor productivity increased by more than initially estimated in the second quarter, while unit labor costs rose by less than initially estimated. The Labor Department said labor productivity climbed by 1.5% in the second quarter. The European Central Bank may decide on the future of its massive stimulus in October even as policymakers are worried about the risks that a strengthening euro pose to the inflation outlook, the bank's chief Mario Draghi said after the bank left its interest rates and asset purchases unchanged. Germany's industrial production remained unchanged in July as the improvement in construction and manufacturing was offset by the deterioration in the energy sector. Industrial production showed nil growth following a 1.1% drop in June.

Global Equities: US stocks witnessed a lack of direction. European stocks managed to hold their gains post the ECB meeting.

Indian Economy: India Inc raised more than Rs. 49,000 crore through private placement of corporate bonds in July, taking the total to Rs. 2.2 lakh crore in the first four months of the ongoing financial year. According to the data available with the Securities and Exchange Board of India (SEBI), companies had garnered Rs. 49,033 crore in July this year compared with Rs. 36,774 crore raised in the year-ago period. The total fund raising through private placement of debt securities reached Rs. 2.21 lakh crore in the current financial year (April-July). In the entire past fiscal, capital raked in through the route stood at Rs. 6.4 lakh crore.

Equity Markets: Local stocks settled almost unchanged while the Nifty 50 index ended with small gains. In today's trade, investors' sentiment remained edgy despite firmness in global stocks. Shares of index heavyweight and cigarette major ITC dropped. Metal and mining stocks were in demand on fresh buying. After opening with small gains on firm Asian stocks, indices continued to pare intraday gains till early afternoon trade. Stocks swung between gains and losses near the flat line later during the session.

Corporate News: A new list of stressed accounts has been sent to banks for resolution by the RBI, Deputy Governor Viral Acharya said according to media reports. The Reserve Bank has now advised banks to resolve some of the other accounts by December 2017; if banks fail to put in place a viable resolution plan within the timelines, these cases also will be referred for resolution under the Insolvency and Bankruptcy code. To supplement the availability of sugar in southern India and to stabilize sugar price, import of 3 LMT of raw sugar through southern ports of India at 25 % import duty under Open General License (Tariff Rate Quota) has been allowed through millers/refiners. The import shall be open to millers/refiners who have their own capacity to convert raw sugar into refined /white. The imports will be allowed through the ports viz. Tuticorin, Karaikal, Chennai, Mangalore, Kakinada, Gangavaram and Vishakapatnam in the South. Regulator Sebi imposed Rs 2,423 crore fine on PACL Ltd and its four directors for illegal fund mobilisation through various schemes that were used by the group to garner over Rs 49,000 crore from the public.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(200.6)	(121.2)	(2.7)
MF(INR cr)	197.5	339.8	566.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,642	29,528	30,262
F&O(INR cr)	854,934	513,690	576,568

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.6	11.1	11.3
NSE VIX	13.0	12.8	11.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,305	0.1 %	12.8 %	Energy	13,240	(0.4) %	12.0 %
IT	10,461	0.4 %	(1.2) %	Pharma	8,949	0.6 %	(14.8) %
Metals	3,646	1.2 %	17.4 %	Finance	10,110	0.3 %	14.6 %
Auto	10,838	0.9 %	9.2 %	PSU	3,254	0.1 %	(7.7) %
FMCG	25,309	(0.6) %	7.1 %	Real Estate	289	0.8 %	32.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bajaj Fin.	1,963	5.6 %	66.1 %	B P C L	524	(2.0) %	23.1 %
Indiabulls	1,316	4.1 %	32.2 %	ITC	270	(1.9) %	(4.0) %
Cadila Hea	511	3.4 %	15.4 %	United Bre	784	(1.7) %	2.5 %
Bajaj Fins	5,624	3.1 %	37.2 %	H P C L	469	(1.5) %	35.8 %
Godrej Con	925	2.8 %	9.1 %	Tata Motor	212	(1.5) %	(24.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (JUL)	08-09-2017	01:30	AUD	-	0.005
Investment Lending (JUL)	08-09-2017	01:30	AUD	-	0.016
RBA Governor Lowe Gives Speech in Sydney	08-09-2017	08:30	AUD	-	-
RBA's Debelle Participates in Panel in Sydney	08-09-2017	03:00	AUD	-	-
Value of Loans (MoM) (JUL)	08-09-2017	01:30	AUD	-	0.003
Capacity Utilization Rate (2Q)	08-09-2017	12:30	CAD	-	0.833
Full Time Employment Change (AUG)	08-09-2017	12:30	CAD	-	35.1
Net Change in Employment (AUG)	08-09-2017	12:30	CAD	-	-
Part Time Employment Change (AUG)	08-09-2017	12:30	CAD	-	(24.3)
Participation Rate (AUG)	08-09-2017	12:30	CAD	-	65.7
Unemployment Rate (AUG)	08-09-2017	12:30	CAD	-	0.063
Unemployment Rate (AUG)	08-09-2017	05:45	CHF	-	0.03
Unemployment Rate s.a. (AUG)	08-09-2017	05:45	CHF	-	0.032
German Current Account (euros) (JUL)	08-09-2017	06:00	EUR	-	-
German Exports s.a. (MoM) (JUL)	08-09-2017	06:00	EUR	-	(0.028)
German Imports s.a. (MoM) (JUL)	08-09-2017	06:00	EUR	-	(0.045)
German Trade Balance (euros) (JUL)	08-09-2017	06:00	EUR	-	-
Labor Costs SA (QoQ) (2Q)	08-09-2017	06:00	EUR	-	0.005
Labor Costs WDA (YoY) (2Q)	08-09-2017	06:00	EUR	-	0.025
BoE/TNS Inflation Next 12 Mths (AUG)	08-09-2017	08:30	GBP	-	0.028
Construction Output SA (MoM) (JUL)	08-09-2017	08:30	GBP	-	(0.001)
Construction Output SA (YoY) (JUL)	08-09-2017	08:30	GBP	-	0.009
Industrial Production (MoM) (JUL)	08-09-2017	08:30	GBP	-	0.005
Industrial Production (YoY) (JUL)	08-09-2017	08:30	GBP	-	0.003
Manufacturing Production (MoM) (JUL)	08-09-2017	08:30	GBP	-	0
Manufacturing Production (YoY) (JUL)	08-09-2017	08:30	GBP	-	0.006
NIESR Gross Domestic Product Estimate (AUG)	08-09-2017	12:00	GBP	-	0.002
Total Trade Balance (Pounds) (JUL)	08-09-2017	08:30	GBP	-	-
Trade Balance Non-Fin (Pounds) (JUL)	08-09-2017	08:30	GBP	-	-



Visible Trade Balance (Pounds) (JUL)	08-09-2017	08:30	GBP	-	-
Bankruptcies (YoY) (AUG)	08-09-2017	04:30	JPY	-	0.003
BOJ Outright Bond Purchase 1~3 Years	08-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	08-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	08-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	08-09-2017	01:10	JPY	-	-
Baker Hughes U.S. Rig Count (SEP 08)	08-09-2017	17:00	USD	-	943
Consumer Credit (JUL)	08-09-2017	19:00	USD	-	-
Fed's George Speaks on the Economic Outlook	08-09-2017	00:15	USD	-	-
Fed's Harker Speaks on Consumer Finance in Philadelphia	08-09-2017	12:45	USD	-	-
Wholesale Inventories (JUL F)	08-09-2017	14:00	USD	-	0.004
Wholesale Trade Sales (MoM) (JUL)	08-09-2017	14:00	USD	-	0.007

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