



08 Nov.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,350	(1.0) %	12.0 %
BSE SENSEX	33,371	(1.1) %	11.6 %
CNX BANK	25,301	(1.1) %	17.4 %
CNX MIDCAP	19,488	(1.6) %	12.4 %
CNX SMALLCAP	8,559	(1.7) %	21.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,557	0.0 %	18.5 %
S&P 500	2,591	(0.0) %	14.7 %
FTSE 100	7,513	(0.7) %	4.7 %
HANG SENG	28,994	1.4 %	30.9 %
NIKKEI	22,938	1.7 %	17.1 %
SHANGHAI COMPOSITE	3,414	0.8 %	8.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.03	0.8 %	(3.5) %
EUR/USD	1.16	(0.1) %	9.4 %
GBP/USD	1.32	0.7 %	7.1 %
USD/JPY	113.77	(0.3) %	(1.9) %
USD/AUD	1.31	(0.1) %	(4.5) %
USD/SGD	1.36	(0.2) %	(4.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	3.1 %	9.6 %
Gold(INR/10g)	29,312	0.6 %	5.4 %
Gold Comex(USD/oz)	1,280	0.7 %	10.6 %
SILVER(INR/1Kg)	39,491	1.5 %	1.5 %
Aluminium(USD/MT)	2,152	(0.6) %	26.4 %
Copper(USD/MT)	6,903	(0.2) %	23.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	(0.0) %	(0.1) %

Global Economy: Eurozone retail sales recover 0.7% month-on-month in September, reversing a 0.1% fall in August, data from Eurostat showed Tuesday. This was the first increase in three months. Sale of 'food, drinks and tobacco' advanced 1.3%, in contrast to August's 0.1% drop. UK house price inflation rose 4.5% in three months to October from the same period of 2016, following 4% gain in three months to September, data from the mortgage lender Halifax and IHS Markit showed. Australia maintained its interest rate at a record low. The board of the Reserve Bank of Australia (RBA), governed by Philip Lowe, maintained the cash rate at 1.50%. The interest rate has been at this level since September 2016. The bank had reduced the rate by 25-basis points each in August and May last year.

Global Equities: European stocks witnessed lax moves even as banks gained ground on growth optimism after ECB President Mario Draghi said there is little evidence that negative rates are undermining banking profitability.

Indian Economy: The provisional figures of Direct Tax collections up to October, 2017 show that net collections are at Rs. 4.39 lakh crore which is 15.2% higher than the net collections for the corresponding period of last year. Net Direct Tax collections represent 44.8% of the total Budget Estimates of Direct Taxes for F.Y. 2017-18 (Rs. 9.8 lakh crore). Gross collections (before adjusting for refunds) have increased by 10.7% to Rs.5.28 lakh crore during April-October, 2017. Refunds amounting to Rs. 89,507 crore have been issued during April, 2017 to October, 2017.

Equity Markets: Local stocks suffered severe setback led by slide in Reliance Industries, State Bank of India and Lupin. The Sensex retreated after scaling record high in intraday trade to settle at one-week low. The Nifty also ended at its lowest level in one week. Rising crude oil prices and weakening rupee spoiled investors sentiment. India imports majority of its crude requirements and a rise in crude oil prices increases concerns on fiscal deficit, inflation and gives lesser room for the government to boost growth through spending on infrastructure. A weak rupee raises the cost of importing crude oil.

Corporate News: Infosys and Adecco Group are transforming the staffing industry by bringing together the power of data, domain, technology and speed to create a brand new business in the world of staffing. This is fundamental for introducing new innovations that help the Adecco Group unlock the opportunities of the platform economy, as well as transform the Adecco Group's core operations. Net profit of Bayer CropScience rose 19.80% to Rs 190.60 crore in the quarter ended September 2017 as against Rs 159.10 crore during the previous quarter ended September 2016. Sales rose 11.61% to Rs 1232.00 crore. Healthcare major Cipla has consolidated profit growth of 17.7% for the quarter ended September 2017, year-on-year, driven by strong operational performance and other income. Consolidated profit during the quarter increased to Rs 435 crore from Rs 370 crore in year-ago. Revenue from operations rose 8.8% to Rs 4,082 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	114.0	145.8	(4.0)
MF(INR cr)	(138.5)	(138.5)	598.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	45,812	43,603	31,601
F&O(INR cr)	684,815	645,443	601,075

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	9.4	9.7	11.0
NSE VIX	13.2	12.5	11.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,301	(1.1) %	17.4 %	Energy	14,132	(1.9) %	19.6 %
IT	11,172	2.2 %	5.5 %	Pharma	9,470	(4.3) %	(9.8) %
Metals	3,886	(1.7) %	25.1 %	Finance	10,419	(1.1) %	18.0 %
Auto	11,332	(1.1) %	14.2 %	PSU	3,854	(3.9) %	9.3 %
FMCG	25,761	(0.2) %	9.0 %	Real Estate	309	(2.2) %	41.0 %

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>
HCL Techno	877	3.8 %	1.2 %	Lupin	860	(16.9) %	(40.1) %
Oracle Fin	3,645	3.4 %	(3.7) %	Cipla	608	(7.2) %	2.5 %
Infosys	956	2.9 %	(5.3) %	S A I L	79	(6.2) %	25.0 %
H P C L	445	2.5 %	28.6 %	B H E L	93	(5.9) %	(16.3) %
Tech Mahin	471	2.2 %	3.8 %	Punjab Nat	191	(5.2) %	27.2 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Building Permits (MoM) (SEP)	08-11-2017	13:30	CAD	-	(0.055)
Housing Starts (OCT)	08-11-2017	13:15	CAD	-	-
Bank of England's Kohn Speaks in London	08-11-2017	11:50	GBP	-	-
Adjusted Current Account Total (Yen) (SEP)	08-11-2017	23:50	JPY	-	-
Bank Lending Ex-Trusts (YoY) (OCT)	08-11-2017	23:50	JPY	-	0.03
Bank Lending incl Trusts (YoY) (OCT)	08-11-2017	23:50	JPY	-	0.03
BOJ Funo makes a speech in Miyazaki	08-11-2017	1:30	JPY	-	-
BOJ Outright Bond Purchase 1~3 Years	08-11-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	08-11-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	08-11-2017	1:10	JPY	-	-
BOJ Summary of Opinions at Oct. 30-31 Meeting	08-11-2017	23:50	JPY	-	-
BoP Current Account Balance (SEP)	08-11-2017	23:50	JPY	-	-
Coincident Index (SEP P)	08-11-2017	5:00	JPY	-	117.7
Foreign Buying Japan Bonds (NOV 03)	08-11-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (NOV 03)	08-11-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (NOV 03)	08-11-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (NOV 03)	08-11-2017	23:50	JPY	-	-
Leading Index CI (SEP P)	08-11-2017	5:00	JPY	-	107.2
Machine Orders (MoM) (SEP)	08-11-2017	23:50	JPY	-	0.034
Machine Orders (YoY) (SEP)	08-11-2017	23:50	JPY	-	0.044
Trade Balance - BOP Basis (Yen) (SEP)	08-11-2017	23:50	JPY	-	-
RBNZ Official Cash Rate (NOV 09)	08-11-2017	20:00	NZD	-	0.0175
DOE Cushing OK Crude Inventory (NOV 03)	08-11-2017	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (NOV 03)	08-11-2017	15:30	USD	-	-
DOE U.S. Distillate Inventory (NOV 03)	08-11-2017	15:30	USD	-	-
DOE U.S. Gasoline Inventories (NOV 03)	08-11-2017	15:30	USD	-	-
MBA Mortgage Applications (NOV 03)	08-11-2017	12:00	USD	-	(0.026)
U.S. to Sell USD23 Bln 10-Year Notes	08-11-2017	18:00	USD	-	-



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