



09 Jun.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,642	(0.1) %	4.4 %
BSE SENSEX	31,213	(0.2) %	4.3 %
CNX BANK	23,664	0.5 %	9.8 %
CNX MIDCAP	17,942	0.2 %	3.5 %
CNX SMALLCAP	7,368	0.4 %	4.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,183	0.0 %	6.5 %
S&P 500	2,434	0.0 %	7.8 %
FTSE 100	7,450	(0.4) %	3.8 %
HANG SENG	26,063	0.3 %	17.7 %
NIKKEI	20,013	0.5 %	2.1 %
SHANGHAI COMPOSITE	3,158	0.3 %	0.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.21	(0.2) %	(4.8) %
EUR/USD	1.12	(0.5) %	5.6 %
GBP/USD	1.28	(1.4) %	3.9 %
USD/JPY	110.12	0.2 %	(5.1) %
USD/AUD	1.33	0.0 %	(3.0) %
USD/SGD	1.38	(0.1) %	(3.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	(0.2) %	(12.8) %
Gold(INR/10g)	29,161	(0.2) %	4.9 %
Gold Comex(USD/oz)	1,277	(1.0) %	10.3 %
SILVER(INR/1Kg)	40,182	(0.2) %	3.2 %
Aluminium(USD/MT)	1,903	(0.1) %	11.8 %
Copper(USD/MT)	5,648	1.3 %	1.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	(0.0) %	(0.3) %

Global Economy: The European Central Bank left its key interest rates and massive monetary stimulus unchanged for a tenth successive policy session, but made a subtle change to its forward guidance by omitting the mention of lower levels for interest rates in future. The euro area growth forecast for this year was raised to 1.9% from 1.8%. The outlook for next year was raised to 1.8% from 1.7 percent. The growth projection for 2019 was boosted to 1.7% from 1.6%. Inflation projection for this year was trimmed to 1.5% from 1.7%. The outlook for next year was also cut to 1.3% from 1.6%. The forecast for 2019 was trimmed to 1.6% from 1.7%. After reporting increases in first-time claims for US unemployment benefits in the two previous weeks, the Labor Department released a report on Thursday showing a pullback in initial jobless claims in the week ended June 3rd. The report said initial jobless claims fell to 245,000.

Global Equities: US stocks showed a lack of direction. Despite the choppy trading, the tech-heavy Nasdaq climbed to a new record closing high.

Indian Economy: The Government of India is promoting e-mobility by working towards adopting indigenous and affordable e-mobility solutions which are sustained by an economic model. Abhay Damle, Joint Secretary (Transport), Ministry of Road Transport and Highways, Government of India, highlighted the importance of building India's transportation and logistics infrastructure for future mobility. He stated that Indian cars produce less pollution compared to trucks and buses, which travel an average 200 km per day and while comprising 2.5% of vehicles, consume 65% of fuel and emit about 70% NOx and SOx. Therefore, the e-mobility industry should focus on converting high mileage vehicles into electrical.

Equity Markets: Key indices settled with small losses after range-bound trade as caution prevailed in global markets. Indices edged higher in early trade tracking steady Asian stocks. Stocks soon slipped into the red and largely languished in negative zone near the flat line later during the session. Stocks of public sector banks declined. Stocks of private sector banks edged higher. IT stocks extended previous session's sharp losses on concerns over pricing pressure.

Corporate News: TCS announced the launch of BaNCS App Development Kit (ADK) that enables banks to design and build their own apps faster and seamlessly deploy across devices and desktops. The announcement was made after market hours yesterday, 8 June 2017. Pidilite Industries announced that Pidilite USA Inc (PUSA), a wholly owned subsidiary of the company has entered into an agreement with Niteo Products LLC, USA for sale of business of the Cyclo Division of PUSA. Cyclo Division has been engaged in the business of automobile grooming, performance and maintenance products and other such products. IndusInd Bank said it raised a \$225 million loan from the Overseas Private Investment Corporation (OPIC) for supporting the expansion of the bank's micro, small and medium enterprise (MSME) lending programs across India. At least 25% of the proposed facility will support women entrepreneurs and reach previously unbanked populations.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	13.9	(108.6)	14.9
MF(INR cr)	(1.2)	222.8	496.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,101	26,415	30,091
F&O(INR cr)	730,067	461,972	524,194

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.2	10.1	11.7
NSE VIX	11.1	11.0	11.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,536	(0.1) %	9.2 %	Energy	11,701	(0.7) %	(1.0) %
IT	10,550	(1.4) %	(0.4) %	Pharma	9,487	2.0 %	(9.7) %
Metals	2,951	0.9 %	(5.0) %	Finance	9,597	0.4 %	8.7 %
Auto	10,940	0.1 %	10.3 %	PSU	3,518	(0.9) %	(0.2) %
FMCG	26,183	(0.2) %	10.8 %	Real Estate	252	(0.2) %	15.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
A B B	1,479	4.0 %	11.9 %	TCS	2,522	(3.6) %	4.6 %
Dr Reddy's	2,636	3.8 %	(3.9) %	GAIL (Indi	389	(3.5) %	1.0 %
Sun Pharma	529	3.4 %	(23.6) %	Petronet L	429	(2.6) %	3.5 %
United Bre	821	2.4 %	7.3 %	Oil India	292	(2.4) %	(11.5) %
Ashok Leyl	95	2.4 %	12.9 %	I O C L	419	(2.0) %	9.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (APR)	09-06-2017	1:30	AUD	-	(0.005)
Investment Lending (APR)	09-06-2017	1:30	AUD	-	0.008
Value of Loans (MoM) (APR)	09-06-2017	1:30	AUD	-	0.009
Capacity Utilization Rate (1Q)	09-06-2017	12:30	CAD	-	0.822
Full Time Employment Change (MAY)	09-06-2017	12:30	CAD	-	(31.2)
Net Change in Employment (MAY)	09-06-2017	12:30	CAD	-	-
Part Time Employment Change (MAY)	09-06-2017	12:30	CAD	-	34.3
Participation Rate (MAY)	09-06-2017	12:30	CAD	-	65.6
Unemployment Rate (MAY)	09-06-2017	12:30	CAD	-	0.065
Consumer Price Index (YoY) (MAY)	09-06-2017	1:30	CNY	-	0.012
Producer Price Index (YoY) (MAY)	09-06-2017	1:30	CNY	-	0.064
German Current Account (euros) (APR)	09-06-2017	6:00	EUR	-	-
German Exports s.a. (MoM) (APR)	09-06-2017	6:00	EUR	-	0.004
German Imports s.a. (MoM) (APR)	09-06-2017	6:00	EUR	-	0.024
German Labor Costs SA (QoQ) (1Q)	09-06-2017	6:00	EUR	-	0.015
German Labor Costs WDA (YoY) (1Q)	09-06-2017	6:00	EUR	-	0.03
German Trade Balance (euros) (APR)	09-06-2017	6:00	EUR	-	-
BoE/TNS Inflation Next 12 Mths (MAY)	09-06-2017	8:30	GBP	-	0.029
Construction Output SA (MoM) (APR)	09-06-2017	8:30	GBP	-	(0.007)
Construction Output SA (YoY) (APR)	09-06-2017	8:30	GBP	-	0.024
Industrial Production (MoM) (APR)	09-06-2017	8:30	GBP	-	(0.005)
Industrial Production (YoY) (APR)	09-06-2017	8:30	GBP	-	0.014
Manufacturing Production (MoM) (APR)	09-06-2017	8:30	GBP	-	(0.006)
Manufacturing Production (YoY) (APR)	09-06-2017	8:30	GBP	-	0.023
NIESR Gross Domestic Product Estimate (MAY)	09-06-2017	12:00	GBP	-	0.002
Total Trade Balance (Pounds) (APR)	09-06-2017	8:30	GBP	-	-
Trade Balance Non EU (Pounds) (APR)	09-06-2017	8:30	GBP	-	-
Visible Trade Balance (Pounds) (APR)	09-06-2017	8:30	GBP	-	-
Trade Balance Invisibles (Pounds) (APR)	09-06-2017	8:30	GBP	-	(0.002)



Baker Hughes U.S. Rig Count (JUN 09)	09-06-2017	17:00	USD	-	916
Wholesale Inventories (APR F)	09-06-2017	14:00	USD	-	(0.003)
Wholesale Trade Sales (MoM) (APR)	09-06-2017	14:00	USD	-	0

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