



09 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,953	(0.3) %	7.7 %
BSE SENSEX	32,014	(0.8) %	6.7 %
CNX BANK	24,464	(0.5) %	13.5 %
CNX MIDCAP	18,248	(0.5) %	5.3 %
CNX SMALLCAP	7,589	(0.8) %	7.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,085	(0.2) %	11.1 %
S&P 500	2,475	(0.2) %	9.6 %
FTSE 100	7,543	0.1 %	5.1 %
HANG SENG	27,855	0.6 %	25.8 %
NIKKEI	19,996	(0.3) %	2.1 %
SHANGHAI COMPOSITE	3,282	0.1 %	4.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.63	0.1 %	(5.6) %
EUR/USD	1.17	(0.4) %	10.6 %
GBP/USD	1.30	(0.4) %	5.6 %
USD/JPY	109.77	(0.8) %	(5.4) %
USD/AUD	1.27	0.7 %	(7.1) %
USD/SGD	1.36	0.2 %	(4.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(0.4) %	(5.6) %
Gold(INR/10g)	28,447	(0.4) %	2.3 %
Gold Comex(USD/oz)	1,266	0.1 %	9.4 %
SILVER(INR/1Kg)	37,202	(2.0) %	(4.4) %
Aluminium(USD/MT)	1,920	1.6 %	12.8 %
Copper(USD/MT)	6,333	0.0 %	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 US Labor Department showing an unexpected jump in job openings in the month of June. The Labor Department said job openings surged up to a record 6.2 million on the last business day of June from 5.7 million on the last business day of May. China's exports in dollar terms, climbed 7.2% year-over-year in July, the General Administration of Customs said Tuesday. Similarly, imports rose 11.0% in July from a year ago. The trade surplus totaled \$46.74 billion in July versus the expected surplus of \$45.0 billion. Germany's trade surplus increased in June as the decline in imports was larger than the fall in exports, Destatis reported Tuesday. Exports dropped 2.8% in June from May, when they climbed 1.5%. Imports also slipped 4.5% after May's 1.3% increase. As a result, the trade surplus increased to a seasonally adjusted EUR 21.2 billion from EUR 20.3 billion in May. On a yearly basis, exports growth eased sharply to 0.7% from 14.1%. Similarly, imports grew only 3.6% after soaring 16.3%. The current account of the balance of payments showed a surplus of EUR 23.6 billion versus EUR 24 billion in the same period of previous year.

Global Equities: The Dow's ended its streak of setting new record closing highs for nine consecutive sessions. Stocks eased after remarks from President Donald Trump added to concerns about rising tensions between the US and North Korea.

Indian Economy: In a major push to competitive, cooperative federalism, NITI Aayog has announced partnership with three States each to radically transform their Health and Education sectors. NITI Aayog has selected Uttar Pradesh, Assam, and Karnataka to improve healthcare delivery and key outcomes in these States. In Education, Madhya Pradesh, Odisha, and Jharkhand have been selected for support to better learning outcomes. The six States have been chosen after a rigorous competitive process based on comprehensive metrics to determine potential for impact and likelihood of success.

Equity Markets: Key benchmark indices settled with modest losses as investors were spooked by the market regulator Securities and Exchange Board of India's (Sebi) directions yesterday, 7 August 2017 to the stock exchanges to initiate action against 331 firms that it suspects are shell companies and are listed on the bourses. Intraday volatility was high on the bourses. The Sensex settled above the psychological 32,000 level after moving above and below that level in intraday trade. The Nifty settled below the psychological 10,000 level after moving above and below that level in intraday trade.

Corporate News: Sun Pharmaceutical Industries (Sun Pharma) announced that one of its wholly owned subsidiaries has agreed to acquire by way of allotment to it, 2.03 lakh Series A Preferred Stock (equivalent to 15.91% fully diluted equity stake on conversion) of Krystal Biotech Inc., United States of America, a biopharmaceutical company using gene therapy to develop treatments for patients suffering from rare debilitating disorders. Bharat Heavy Electricals (Bhel) announced that it has achieved another milestone in expanding and consolidating its footprint in the international market by securing export orders from Chile and Estonia. With these latest orders, Bhel has now expanded its global footprint to 82 countries across all the six inhabited continents. Thomas Cook (India) announced that it has recently launched a unique group tours portfolio, 'Romantic Getaways', to tap into Middle India's high growth honeymoon travel segment.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(26.1)	(41.7)	22.8
MF(INR cr)	1,382.6	412.5	470.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,653	30,509	30,350
F&O(INR cr)	725,970	578,695	550,431

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.9	10.2	11.1
NSE VIX	12.8	11.9	11.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,600	(1.2) %	14.2 %	Energy	13,042	(1.7) %	10.3 %
IT	10,624	(0.5) %	0.3 %	Pharma	9,126	(1.1) %	(13.1) %
Metals	3,390	1.5 %	9.2 %	Finance	10,102	(1.0) %	14.5 %
Auto	11,118	(0.4) %	12.1 %	PSU	3,570	(2.4) %	1.2 %
FMCG	25,306	(1.2) %	7.0 %	Real Estate	272	(4.4) %	24.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vedanta	298	3.5 %	9.2 %	DLF	179	(6.7) %	21.6 %
Hindalco I	235	3.2 %	21.3 %	Dr Reddy's	2,096	(5.0) %	(23.6) %
Tata Steel	616	2.7 %	26.9 %	H P C L	436	(4.8) %	26.1 %
Cipla	579	2.1 %	(2.4) %	B P C L	505	(4.3) %	18.7 %
GlaxoSmith	5,542	1.5 %	6.9 %	I O C L	413	(4.2) %	8.4 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (JUN)	09-08-2017	01:30	AUD	-	0.01
Investment Lending (JUN)	09-08-2017	01:30	AUD	-	(0.014)
Value of Loans (MoM) (JUN)	09-08-2017	01:30	AUD	-	0.029
Westpac Consumer Conf Index (AUG)	09-08-2017	00:30	AUD	-	96.6
Westpac Consumer Confidence (AUG)	09-08-2017	00:30	AUD	-	0.004
Building Permits (MoM) (JUN)	09-08-2017	12:30	CAD	-	0.089
Consumer Price Index (YoY) (JUL)	09-08-2017	01:30	CNY	-	0.015
Producer Price Index (YoY) (JUL)	09-08-2017	01:30	CNY	-	0.055
RICS House Price Balance (JUL)	09-08-2017	23:01	GBP	-	0.07
BOJ Outright Bond Purchase 10~25 Years	09-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	09-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Year	09-08-2017	01:10	JPY	-	-
Domestic Corporate Goods Price Index (MoM) (JUL)	09-08-2017	23:50	JPY	-	0
Domestic Corporate Goods Price Index (YoY) (JUL)	09-08-2017	23:50	JPY	-	0.021
Foreign Buying Japan Bonds (Yen) (AUG 04)	09-08-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (AUG 04)	09-08-2017	23:50	JPY	-	-
Housing Loans (YoY) (2Q)	09-08-2017	23:50	JPY	-	0.033
Japan Buying Foreign Bonds (Yen) (AUG 04)	09-08-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 04)	09-08-2017	23:50	JPY	-	-
Machine Orders (MoM) (JUN)	09-08-2017	23:50	JPY	-	(0.036)
Machine Orders (YoY) (JUN)	09-08-2017	23:50	JPY	-	0.006
Machine Tool Orders (YoY) (JUL P)	09-08-2017	06:00	JPY	-	0.311
Card Spending Retail (MoM) (JUL)	09-08-2017	22:45	NZD	-	0
NZ Card Spending (MoM) (JUL)	09-08-2017	22:45	NZD	-	0.001
RBNZ's Wheeler news conference on policy statement	09-08-2017	22:00	NZD	-	-
Reserve Bank of New Zealand Rate Decision (AUG 10)	09-08-2017	21:00	NZD	-	0.0175
DOE Cushing OK Crude Inventory (AUG 04)	09-08-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 04)	09-08-2017	14:30	USD	-	-
DOE U.S. Distillate Fuel Inventories (AUG 04)	09-08-2017	14:30	USD	-	-



DOE U.S. Gasoline Inventories (AUG 04)	09-08-2017	14:30	USD	-	-
MBA Mortgage Applications (AUG 04)	09-08-2017	11:00	USD	-	(0.028)
Non-Farm Productivity (2Q P)	09-08-2017	12:30	USD	-	0
U.S. to Sell USD23 Bln 10-Year Notes	09-08-2017	17:00	USD	-	-
Unit Labor Costs (2Q P)	09-08-2017	12:30	USD	-	0.022
Wholesale Inventories (JUN F)	09-08-2017	14:00	USD	-	0.006
Wholesale Trade Sales (MoM) (JUN)	09-08-2017	14:00	USD	-	(0.005)

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