



10 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,684	0.2 %	4.8 %
BSE SENSEX	31,361	(0.0) %	5.6 %
CNX BANK	23,517	0.3 %	9.1 %
CNX MIDCAP	18,197	0.5 %	5.0 %
CNX SMALLCAP	7,582	0.6 %	7.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,414	0.4 %	7.7 %
S&P 500	2,425	0.6 %	7.4 %
FTSE 100	7,351	0.2 %	2.4 %
HANG SENG	25,341	(0.5) %	14.4 %
NIKKEI	19,929	(0.3) %	1.7 %
SHANGHAI COMPOSITE	3,218	0.2 %	2.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.59	(0.3) %	(4.2) %
EUR/USD	1.14	(0.1) %	7.6 %
GBP/USD	1.29	(0.6) %	4.8 %
USD/JPY	113.92	0.1 %	(1.8) %
USD/AUD	1.32	(0.3) %	(3.8) %
USD/SGD	1.38	(0.1) %	(3.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	44	(2.0) %	(15.5) %
Gold(INR/10g)	28,009	(0.4) %	0.7 %
Gold Comex(USD/oz)	1,212	(0.6) %	4.7 %
SILVER(INR/1Kg)	36,860	(0.9) %	(5.3) %
Aluminium(USD/MT)	1,920	(0.3) %	12.8 %
Copper(USD/MT)	5,809	(0.3) %	4.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	0.0 %	(0.1) %

Global Economy: Employment in the US increased by much more than expected in the month of June, according to a closely watched report released by the Labor Department on Friday. The non-farm payroll employment jumped by 222,000 jobs in June following an upwardly revised increase of 152,000 jobs in May. The bigger than expected increase in employment reflected solid job growth in the healthcare and social assistance, leisure and hospitality and professional and business services sectors. Despite the stronger than expected job growth, the unemployment rate inched up to 4.4% in June from 4.3% in May. With the modest increase, the unemployment rate edged up off the sixteen-year low set in the previous month. The Labor Department also said average hourly employee earnings rose by 0.2% to \$26.25. Average hourly earnings in June were up by 2.5% year-over-year.

Global Equities: After showing a significant move to the downside in the previous session, stocks regained some ground on Friday following the US jobs data. The Nasdaq and the S&P 500 rebounded after ending Thursday's trading at their lowest closing levels in over a month.

Indian Economy: As per the latest release from Cotton Association of India (CAI), India's Cotton exports are likely to see a decline of 17 per cent in the 2016-17 cotton season. India exported 72 lakh bales of cotton in 2015-16 and has estimated the exports to touch 60 lakh bales in the ongoing cotton season. The CAI has placed its cotton crop estimate for the season at 336.25 lakh bales of 170 kgs each. The projected balance sheet drawn by the CAI has estimated total cotton supply for the season at 406.25 lakh bales while the domestic consumption is estimated at 305 lakh bales. India had harvested 337.75 million bales of cotton in 2015-16.

Equity Markets: Indian equity markets, in the week ended Friday, 7 July 2017, gave thumbs up to the rollout of historic Goods and Service Tax (GST). The barometer index, the S&P BSE Sensex touched a record closing high on Thursday, 6 July 2017. GST, which came into effect from 1 July 2017, is the biggest tax reform since independence, paving the way for realization of the goal of One Nation - One Tax - One Market.

Corporate News: Tata Motors said that the sales of its British luxury unit Jaguar Land Rover (JLR) rose 11% to 51,591 units in June 2017 over June 2016, driven by healthy China market. Jaguar sales grew by 16.4% to 15,343 units in June 2017 over June 2016. Land Rover sales rose 8.9% to 36,248 units in June 2017 over June 2016. Sun Pharmaceutical Industries said that the company and one of its wholly-owned subsidiaries have entered into settlements with certain plaintiffs in re Modafinil Antitrust Litigation matter currently pending in the United States District Court for the Eastern District of Pennsylvania. United Bank of India said that it proposes to approve by circulation on 12 July 2017, allotment of unsecured Basel III compliant listed Tier-2 bonds, with or without greenshoe option, aggregating upto Rs 500 crore. Alok Industries said it has been supplied with a copy of the application for resolution proceedings filed by State Bank of India, before the National Company Law Tribunal (NCLT), Ahmedabad on 29 June 2017. The hearing on this matter has been scheduled for 12 July 2017.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	93.6	(51.1)	24.6
MF(INR cr)	232.3	394.7	481.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	27,518	26,388	29,240
F&O(INR cr)	255,722	484,377	533,261

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	11.2	11.5	11.4
NSE VIX	10.9	11.1	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	23,449	(0.1) %	8.8 %	Energy	12,056	1.4 %	2.0 %
IT	10,088	(0.6) %	(4.8) %	Pharma	9,724	1.3 %	(7.4) %
Metals	3,088	(0.2) %	(0.6) %	Finance	9,566	(0.4) %	8.4 %
Auto	10,729	(0.2) %	8.1 %	PSU	3,381	(0.3) %	(4.1) %
FMCG	27,466	(0.4) %	16.2 %	Real Estate	279	1.8 %	27.5 %

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>
Divi's Lab	680	3.5 %	8.4 %	Bharti Inf	404	(2.5) %	22.7 %
Reliance I	1,491	3.4 %	8.5 %	Pidilite I	812	(2.2) %	15.5 %
SAIL	62	3.4 %	(2.3) %	Shriram Tr	1,090	(1.9) %	(1.3) %
Lupin	1,117	3.3 %	(22.1) %	Vedanta	257	(1.7) %	(5.7) %
United Spi	2,623	2.6 %	28.1 %	Indiabulls	1,065	(1.6) %	7.0 %

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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