



10 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,908	(0.7) %	7.3 %
BSE SENSEX	31,798	(0.7) %	6.3 %
CNX BANK	24,375	(0.9) %	13.1 %
CNX MIDCAP	18,040	(1.7) %	4.1 %
CNX SMALLCAP	7,516	(1.8) %	6.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,049	(0.2) %	10.9 %
S&P 500	2,474	(0.0) %	9.6 %
FTSE 100	7,498	(0.6) %	4.5 %
HANG SENG	27,757	(0.4) %	25.3 %
NIKKEI	19,739	(1.3) %	0.7 %
SHANGHAI COMPOSITE	3,276	(0.2) %	4.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.84	0.0 %	(5.3) %
EUR/USD	1.18	(0.5) %	10.9 %
GBP/USD	1.30	(0.4) %	5.7 %
USD/JPY	110.06	(0.5) %	(5.1) %
USD/AUD	1.27	0.4 %	(7.4) %
USD/SGD	1.36	0.1 %	(4.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(0.4) %	(6.0) %
Gold(INR/10g)	28,560	0.4 %	2.7 %
Gold Comex(USD/oz)	1,270	0.4 %	9.8 %
SILVER(INR/1Kg)	37,797	1.6 %	(2.9) %
Aluminium(USD/MT)	1,981	3.2 %	16.4 %
Copper(USD/MT)	6,364	0.5 %	14.2 %

FIXED INCOME

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

Global Economy: A report released by the Commerce Department on Wednesday showed wholesale inventories in the US rose by slightly more than expected in the month of June. The Commerce Department said wholesale inventories climbed by 0.7% in June after rising by an upwardly revised 0.6% in May. Labor productivity in the US increased by slightly more than expected. The labor productivity rose by 0.9% in the second quarter. China's inflation eased slightly in July. Inflation eased to 1.4% in July from 1.5 percent in June, the National Bureau of Statistics reported Wednesday. Inflation was well below the government's target of around 3% for the whole year of 2017. Food prices dropped 1.1% following June's 1.2% decrease. On a monthly basis, consumer prices edged up 0.1%, following a 0.2% drop in June. This was the first increase in three months.

Global Equities: Global stocks saw continued weakness during trading on Wednesday. Stocks eased after remarks from President Donald Trump added to concerns about rising tensions between the US and North Korea.

Indian Economy: The Direct Tax collections up to July, 2017 in the Current Financial Year 2017-18 continue to register steady growth. Direct Tax collection during the said period, net of refunds, stands at Rs. 1.90 lakh crore which is 19.1% higher than the net collections for the corresponding period of last year. This collection is 19.5% of the total Budget Estimates (B.E.) of Direct Taxes for the Financial Year 2017-18. So far as the growth rate for Corporate Income Tax (CIT) and Personal Income Tax (PIT) in terms of Gross Revenue Collections is concerned, the growth rate for CIT is 7.2% while that for PIT (including STT) is 17.5%.

Equity Markets: Key benchmark indices registered losses for third day in a row as weakness in global stocks amid escalating geopolitical tensions between US and North Korea weighed on sentiment on the domestic bourses. The Nifty hit almost three-week closing low. The Sensex settled below the psychological 32,000 mark after sliding below that level in opening trade. Domestic stocks saw a gap-down opening on negative global cues. Stocks cut losses in morning trade as select index pivotals were off intraday day lows. Key indices extended fall in mid-morning trade and languished in the red till afternoon trade.

Corporate News: Shares of Security and Intelligence Services (India) (SIS) get listed on the stock exchanges today, 10 August 2017. The issue price is fixed at Rs 815 per share. Promoted by Ravindra Kishore Sinha and Rituraj Kishore Sinha, SIS is a leading provider of private security and facility management services in India. The initial public offer (IPO) of SIS which concluded on 2 August 2017, received strong response from investors. It was subscribed 7.07 times. The IPO price band was fixed at Rs 805-815 per share. Tata Motors' consolidated net profit rose 41.59% to Rs 3200 crore on 9.92% drop in revenue to Rs 58651 crore in Q1 June 2017 over Q1 June 2016. Revenue was lower due to translation impact from Pound to Rupee. Aurobindo Pharma's consolidated net profit fell 11.4% to Rs 518.51 crore on 2.3% decline in net sales to Rs 3621.07 crore in Q1 June 2017 over Q1 June 2016. Eicher Motors' consolidated net profit rose 22.1% to Rs 459.62 crore on 28.5% growth in net sales to Rs 1991.78 crore in Q1 June 2017 over Q1 June 2016. NMDC's net profit rose 36.2% to Rs 969.20 crore on 65.1% growth in net sales to Rs 2841.53 crore in Q1 June 2017 over Q1 June 2016.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	297.8	14.9	25.9
MF(INR cr)	648.1	467.5	472.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,293	30,335	30,338
F&O(INR cr)	733,230	600,771	552,485

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.0	10.3	11.1
NSE VIX	13.5	12.1	11.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,375	(0.9) %	13.1 %	Energy	13,010	(0.3) %	10.1 %
IT	10,614	(0.1) %	0.2 %	Pharma	8,766	(3.9) %	(16.5) %
Metals	3,383	(0.2) %	8.9 %	Finance	10,022	(0.8) %	13.6 %
Auto	10,926	(1.7) %	10.1 %	PSU	3,556	(0.4) %	0.8 %
FMCG	25,103	(0.8) %	6.2 %	Real Estate	271	(0.5) %	23.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Havells In	498	2.6 %	6.2 %	Cadila Hea	485	(8.4) %	9.6 %
Hindalco I	239	1.9 %	23.7 %	Aurobindo	684	(5.9) %	0.1 %
Titan Comp	619	1.6 %	34.8 %	Sun Pharma	474	(5.2) %	(31.5) %
NTPC	174	1.5 %	5.5 %	Divi's Lab	639	(5.1) %	1.9 %
United Bre	832	1.4 %	8.8 %	Bajaj Fin.	1,698	(4.6) %	43.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (AUG)	10-08-2017	01:00	AUD	-	0.044
RBA's Lowe Before House Economics Committee in Melbourne	10-08-2017	23:30	AUD	-	-
New Housing Price Index (MoM) (JUN)	10-08-2017	12:30	CAD	-	0.007
New Housing Price Index (YoY) (JUN)	10-08-2017	12:30	CAD	-	0.038
Construction Output SA (MoM) (JUN)	10-08-2017	08:30	GBP	-	(0.012)
Construction Output SA (YoY) (JUN)	10-08-2017	08:30	GBP	-	(0.003)
Industrial Production (MoM) (JUN)	10-08-2017	08:30	GBP	-	(0.001)
Industrial Production (YoY) (JUN)	10-08-2017	08:30	GBP	-	(0.002)
Manufacturing Production (MoM) (JUN)	10-08-2017	08:30	GBP	-	(0.002)
Manufacturing Production (YoY) (JUN)	10-08-2017	08:30	GBP	-	0.004
NIESR Gross Domestic Product Estimate (JUL)	10-08-2017	12:00	GBP	-	0.003
Total Trade Balance (Pounds) (JUN)	10-08-2017	08:30	GBP	-	-
Trade Balance Non EU (Pounds) (JUN)	10-08-2017	08:30	GBP	-	-
Visible Trade Balance (Pounds) (JUN)	10-08-2017	08:30	GBP	-	-
BOJ Outright Bond Purchase 1~3 Year	10-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	10-08-2017	01:10	JPY	-	-
Tertiary Industry Index (MoM) (JUN)	10-08-2017	04:30	JPY	-	(0.001)
Tokyo Avg Office Vacancies (JUL)	10-08-2017	02:00	JPY	-	3.26
Business NZ Performance of Manufacturing Index (JUL)	10-08-2017	22:30	NZD	-	56.2
Food Prices (MoM) (JUL)	10-08-2017	22:45	NZD	-	0.002
RBNZ's Wheeler at Parliament Select Committee	10-08-2017	01:10	NZD	-	-
Continuing Claims (JUL 29)	10-08-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (AUG 04)	10-08-2017	14:30	USD	-	20
EIA Working Natural Gas Implied Flow (AUG 04)	10-08-2017	14:30	USD	-	20
Fed's Dudley to Hold Press Briefing	10-08-2017	14:00	USD	-	-
Initial Jobless Claims (AUG 05)	10-08-2017	12:30	USD	-	-
Monthly Budget Statement (JUL)	10-08-2017	18:00	USD	-	-
PPI Ex Food and Energy (MoM) (JUL)	10-08-2017	12:30	USD	-	0.001
PPI Ex Food and Energy (YoY) (JUL)	10-08-2017	12:30	USD	-	0.010



PPI Ex Food, Energy, Trade (MoM) (JUL)	10-08-2017	12:30	USD	-	0.002
PPI Ex Food, Energy, Trade (YoY) (JUL)	10-08-2017	12:30	USD	-	0.02
PPI Final Demand (MoM) (JUL)	10-08-2017	12:30	USD	-	0.001
PPI Final Demand (YoY) (JUL)	10-08-2017	12:30	USD	-	0.02
U.S. to Sell USD15 Bln 30-Year Bonds	10-08-2017	17:00	USD	-	-

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