



10 Oct.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,989	0.0 %	8.1 %
BSE SENSEX	31,847	0.1 %	6.5 %
CNX BANK	24,252	0.0 %	12.5 %
CNX MIDCAP	18,524	0.0 %	6.9 %
CNX SMALLCAP	7,894	0.0 %	11.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,761	(0.1) %	14.5 %
S&P 500	2,545	(0.2) %	12.7 %
FTSE 100	7,508	(0.2) %	4.6 %
HANG SENG	28,327	(0.5) %	27.9 %
NIKKEI	20,691	0.3 %	5.6 %
SHANGHAI COMPOSITE	3,374	0.8 %	7.6 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.36	0.3 %	(3.1) %
EUR/USD	1.18	0.5 %	11.1 %
GBP/USD	1.32	0.4 %	7.0 %
USD/JPY	112.69	(0.1) %	(2.8) %
USD/AUD	1.29	0.0 %	(6.0) %
USD/SGD	1.36	(0.5) %	(4.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(3.0) %	(5.8) %
Gold(INR/10g)	29,594	0.9 %	6.4 %
Gold Comex(USD/oz)	1,279	0.6 %	10.5 %
SILVER(INR/1Kg)	39,406	1.8 %	1.2 %
Aluminium(USD/MT)	2,122	(0.1) %	24.6 %
Copper(USD/MT)	6,639	2.0 %	19.1 %

**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:** Fifty-one large Eurozone banks are leaving themselves exposed to a sudden change in interest rates and may need to aside more capital against that risk, the European Central Bank said on Monday. The ECB is preparing to start scaling back its monetary stimulus after years of ultra-low interest rates and massive bond purchases. Eurozone investor confidence index rose unexpectedly to 29.7 in October from 28.2 in September, survey results from think tank Sentix showed Monday. The score was forecast to fall to 28.0. Sentix said the economic momentum continues in the currency bloc. Germany's industrial production expanded the most since July 2011, signaling a strong growth in the third quarter. Industrial output grew 2.6% month-on-month in August, reversing a revised 0.1% fall in July. China's service sector growth slowed in September, as a private survey showed Monday that an index for the sector fell to the lowest in 21 months. The Cain General Services Purchasing Managers Index (PHI) slipped to 50.6 in September from 52.7 in August.

**Global Equities:** China stocks hit 21-month highs on Monday after a week-long holiday. The sentiments were boosted by cut in banks' reserve requirement ratio. Investors also caught up with the latest upmove in the global stocks and kept the Chinese indices in a winning mode.

**Indian Economy:** The RBI's Consumer Confidence Survey showed that the response to the current perception of the general economic situation showed 34.6% as "improved" as of September 2017, down from 44.6% in September 2016. The RBI survey show that more people see consumer confidence declining, business sentiment in manufacturing dipping, inflation on the rise and growth easing. According to the survey, 40.7 percent of the respondents said that the economic situation has worsened in September 2017 as compared to 25.3% in September 2016.

**Equity Markets:** Local indices witnessed small gains on first trading day of the week. The Nifty failed to settle above the psychologically important 10,000 mark after hitting an intraday high above that level. The Sensex pared gains after hitting its highest intraday level in two weeks in morning trade. The Nifty pared gains after hitting its highest intraday level in more than two weeks in morning trade. The Nifty pared gains after crossing the psychologically important 10,000 mark in morning trade.

**Corporate News:** Worldwide IT spending is projected to total \$3.7 trillion in 2018, an increase of 4.3% from 2017 estimated spending of \$3.5 trillion, according to the latest forecast by Gartner, Inc. Enterprise software and IT services continue to exhibit strong growth, with communications services continuing to drive the majority of spending. Software spending is projected to grow 8.5% in 2017, and it will grow another 9.4% in 2018 to total \$387 billion. IT services spending is on pace to grow 4% in 2017 to reach \$931 billion, and increase 5.3% in 2018 to reach \$980 billion. Domestic passenger vehicle sales rose 11.32% to 3,09,955 units in September, from 2,78,428 in the same month last year, according to data released by industry body Society of Indian Automobile Manufacturers (SIAM). Car sales soared around 7% to 2,08,656 units. Motorcycle sales also jumped by 7% to 12,69,612 units. Sales of commercial vehicles jumped by a massive 25.27% to 77,195 units in September. Vehicle sales across categories registered a spurt of 10% to 24,90,034 units, from 22,63,620 in September 2016.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(146.2)	(98.9)	(14.7)
MF(INR cr)	1,155.5	902.6	627.3

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,245	28,713	30,609
F&O(INR cr)	371,922	499,218	587,189

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.7	9.5	11.1
NSE VIX	11.4	11.7	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,252	0.3 %	12.5 %	Energy	13,278	(0.9) %	12.3 %
IT	10,680	0.2 %	0.8 %	Pharma	9,506	0.3 %	(9.5) %
Metals	3,718	0.2 %	19.7 %	Finance	10,002	0.2 %	13.3 %
Auto	11,006	(0.0) %	10.9 %	PSU	3,101	(0.0) %	(12.1) %
FMCG	25,286	0.6 %	7.0 %	Real Estate	285	2.3 %	30.1 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Godrej Con	981	3.5 %	15.7 %	Aurobindo	729	(2.3) %	6.8 %
Titan Comp	616	3.3 %	34.1 %	Rural Elec	152	(2.2) %	(15.4) %
Piramal En	2,766	2.3 %	42.9 %	Power Grid	201	(1.9) %	2.4 %
Coal India	281	1.7 %	(4.6) %	ONGC	171	(1.8) %	(8.1) %
Tech Mahin	463	1.4 %	2.3 %	B P C L	481	(1.7) %	13.1 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Conditions (SEP)	10-10-2017	00:30	AUD	-	15
NAB Business Confidence (SEP)	10-10-2017	00:30	AUD	-	5
RBA's Debelle Gives Speech in HK Via Video Link	10-10-2017	03:20	AUD	-	-
Westpac Consumer Conf Index (OCT)	10-10-2017	23:30	AUD	-	97.9
Westpac Consumer Confidence (OCT)	10-10-2017	23:30	AUD	-	0.025
Bank of Canada's Wilkins speaks at IMF panel	10-10-2017	18:00	CAD	-	-
Building Permits (MoM) (AUG)	10-10-2017	12:30	CAD	-	(0.035)
Housing Starts (SEP)	10-10-2017	12:15	CAD	-	-
Unemployment Rate (SEP)	10-10-2017	05:45	CHF	-	0.03
Unemployment Rate s.a. (SEP)	10-10-2017	05:45	CHF	-	0.032
German Current Account (euros) (AUG)	10-10-2017	06:00	EUR	-	-
German Exports s.a. (MoM) (AUG)	10-10-2017	06:00	EUR	-	0.002
German Imports s.a. (MoM) (AUG)	10-10-2017	06:00	EUR	-	0.022
German Trade Balance (euros) (AUG)	10-10-2017	06:00	EUR	-	-
Construction Output SA (MoM) (AUG)	10-10-2017	08:30	GBP	-	(0.009)
Construction Output SA (YoY) (AUG)	10-10-2017	08:30	GBP	-	(0.004)
Industrial Production (MoM) (AUG)	10-10-2017	08:30	GBP	-	0.002
Industrial Production (YoY) (AUG)	10-10-2017	08:30	GBP	-	0.004
Manufacturing Production (MoM) (AUG)	10-10-2017	08:30	GBP	-	0.005
Manufacturing Production (YoY) (AUG)	10-10-2017	08:30	GBP	-	0.019
NIESR Gross Domestic Product Estimate (SEP)	10-10-2017	12:00	GBP	-	0.004
Total Trade Balance (Pounds) (AUG)	10-10-2017	08:30	GBP	-	-
Trade Balance Non EU (Pounds) (AUG)	10-10-2017	08:30	GBP	-	-
Visible Trade Balance (Pounds) (AUG)	10-10-2017	08:30	GBP	-	-
Bankruptcies (YoY) (SEP)	10-10-2017	04:30	JPY	-	(0.1198)
BOJ Kuroda speaks at Branch Managers' meeting	10-10-2017	00:30	JPY	-	-
BOJ Outright Bond Purchase 1~3 Years	10-10-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	10-10-2017	01:10	JPY	-	-
East West Bank Consumer Confidence SA (SEP)	10-10-2017	05:00	USD	-	10.7



Eco Watchers Survey Outlook SA (SEP)	10-10-2017	05:00	JPY	-	51.1
Machine Orders (MoM) (AUG)	10-10-2017	23:50	JPY	-	0.08
Machine Orders (YoY) (AUG)	10-10-2017	23:50	JPY	-	(0.075)
ANZ Truckometer Heavy (MoM) (SEP)	10-10-2017	21:00	NZD	-	0.062
Fed's Kashkari Speaks at Regional Economic Conference	10-10-2017	14:00	USD	-	-
NFIB Small Business Optimism (SEP)	10-10-2017	10:00	USD	-	105.3
U.S. to Sell USD20 Bln 52-Week Bills	10-10-2017	15:30	USD	-	-
U.S. to Sell USD35 Bln 4-Week Bills	10-10-2017	15:30	USD	-	-
U.S. to Sell USD36 Bln 6-Month Bills	10-10-2017	15:30	USD	-	-
U.S. to Sell USD42 Bln 3-Month Bills	10-10-2017	15:30	USD	-	-

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