



10 Nov.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,309	0.1 %	11.6 %
BSE SENSEX	33,251	0.1 %	11.2 %
CNX BANK	25,291	0.4 %	17.4 %
CNX MIDCAP	19,595	1.2 %	13.0 %
CNX SMALLCAP	8,537	0.8 %	20.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,462	(0.4) %	18.0 %
S&P 500	2,585	(0.4) %	14.5 %
FTSE 100	7,484	(0.6) %	4.3 %
HANG SENG	29,137	0.8 %	31.5 %
NIKKEI	22,869	(0.2) %	16.7 %
SHANGHAI COMPOSITE	3,428	0.4 %	9.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.96	(0.1) %	(3.7) %
EUR/USD	1.16	(0.0) %	9.4 %
GBP/USD	1.31	(0.4) %	6.7 %
USD/JPY	114.00	0.2 %	(1.7) %
USD/AUD	1.30	(0.3) %	(4.8) %
USD/SGD	1.36	(0.1) %	(4.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	(0.7) %	8.6 %
Gold(INR/10g)	29,391	0.0 %	5.7 %
Gold Comex(USD/oz)	1,282	0.3 %	10.8 %
SILVER(INR/1Kg)	39,527	(0.0) %	1.6 %
Aluminium(USD/MT)	2,104	(1.3) %	23.6 %
Copper(USD/MT)	6,812	(0.7) %	22.2 %

**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 %	(0.1) %

**Global Economy:** The Organization for Economic Co-operation and Development area composite leading indicator signaled stable growth momentum the region. The composite leading index rose slightly to 100.2 in September from 100.1 in August. Wholesale inventories in the US rose in line with economist estimates in the month of September, the Commerce Department revealed in a report on Thursday. The report said wholesale inventories edged up by 0.3% in September after climbing by a revised 0.8% in August. Eurozone is set for its fastest growth in a decade this year, the European Commission said on Thursday. In its Autumn Forecast, the executive arm of the European Union raised the euro area growth forecast for this year to 2.2% from 1.7%. The EU growth forecast for this year was also lifted to 2.3% from 1.9% seen in the Spring projections.

**Global Equities:** US stocks slipped as elevated levels triggered some profit selling amid worries linked to the US tax reform legislation. European markets also took a tumble on poor corporate earnings.

**Indian Economy:** The Price Stabilization Fund Management Committee (PSFMC) decided to import onions through Government Agency to augment the availability of onions in market to moderate prices. Further, it was also decided that NAFED and SFAC to procure 10,000 MT and 2,000 MT onions respectively from producing areas including Delhi and supply it to consuming areas to enhance its availability and to help moderate prices.

**Equity Markets:** Amid a divergent trend among various index constituents, key benchmark indices settled with small gains in a highly volatile session of trade. Indices opened with modest gains, backed by positive global cues. After hitting day's high, key indices hovered in positive terrain in morning trade. The Sensex recovered after declining to its lowest level in almost two weeks. The Nifty also recovered after declining to its lowest level in more than two weeks.

**Corporate News:** Tata Motors beat market estimates to report a three-fold increase in consolidated net profit at Rs 2,502 crore for the three months ended September 30, 2017, aided by strong demand for new models of Jaguar Land Rover (JLR). The company posted a net profit of Rs 848 crore in the year-ago period. State Bank of India, Mahindra & Mahindra, Bharat Petroleum Corporation, Motherson Sumi Systems, DLF, Bank of India would be watched ahead of earnings today. Reliance Jio, which disrupted the telecom market, has started to witness a slowdown in subscriber additions while it continues to gain market share. Data from the Telecom Regulatory Authority of India (Trai) show the company added 4.09 million customers in August. This is the second-lowest monthly incremental growth for the company since its launch.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	920.3	268.0	3.0
MF(INR cr)	(1,359.5)	(307.0)	572.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,889	44,093	31,782
F&O(INR cr)	1,194,239	746,047	606,327

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.8	9.7	11.0
NSE VIX	13.3	12.7	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,291	0.4 %	17.4 %	Energy	14,011	0.6 %	18.5 %
IT	11,248	0.0 %	6.2 %	Pharma	9,436	(0.6) %	(10.2) %
Metals	3,850	0.5 %	24.0 %	Finance	10,362	0.0 %	17.4 %
Auto	11,243	(0.1) %	13.3 %	PSU	3,836	1.5 %	8.8 %
FMCG	25,726	(0.1) %	8.8 %	Real Estate	306	(0.1) %	39.8 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Pidilite I	813	5.7 %	15.6 %	Cadila Hea	479	(3.7) %	8.1 %
Titan Comp	778	4.7 %	69.3 %	Ashok Leyl	115	(3.2) %	37.2 %
GlaxoSmith	5,943	4.3 %	14.7 %	Idea Cellu	97	(2.2) %	13.6 %
Indiabulls	1,235	3.3 %	24.0 %	Shree Ceme	18,110	(2.1) %	5.5 %
Bharat Ele	184	3.1 %	26.8 %	ITC	260	(2.0) %	(7.6) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Statement on Monetary Policy	10-11-2017	0:30	AUD	-	-
ECB's Mersch Speaks in Windsor, England	10-11-2017	12:30	EUR	-	-
Construction Output SA (MoM) (SEP)	10-11-2017	9:30	GBP	-	0.006
Construction Output SA (YoY) (SEP)	10-11-2017	9:30	GBP	-	0.035
Industrial Production (MoM) (SEP)	10-11-2017	9:30	GBP	-	0.002
Industrial Production (YoY) (SEP)	10-11-2017	9:30	GBP	-	0.016
Manufacturing Production (MoM) (SEP)	10-11-2017	9:30	GBP	-	0.004
Manufacturing Production (YoY) (SEP)	10-11-2017	9:30	GBP	-	0.028
NIESR Gross Domestic Product Estimate (OCT)	10-11-2017	13:00	GBP	-	0.004
Trade Balance (SEP)	10-11-2017	9:30	GBP	-	-
Trade Balance Non EU GBP/Mn (SEP)	10-11-2017	9:30	GBP	-	-
Visible Trade Balance (Pounds) (SEP)	10-11-2017	9:30	GBP	-	-
BOJ Outright Bond Purchase 10~25 Years	10-11-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	10-11-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	10-11-2017	1:10	JPY	-	-
Tertiary Industry Index (MoM) (SEP)	10-11-2017	4:30	JPY	-	(0.002)
Baker Hughes U.S. Rig Count (NOV 10)	10-11-2017	18:00	USD	-	898
Monthly Budget Statement (OCT)	10-11-2017	19:00	USD	-	-
U. of Mich. 1 Yr Inflation (NOV P)	10-11-2017	15:00	USD	-	0.024
U. of Mich. 5-10 Yr Inflation (NOV P)	10-11-2017	15:00	USD	-	0.025
U. of Mich. Current Conditions (NOV P)	10-11-2017	15:00	USD	-	116.5
U. of Mich. Expectations (NOV P)	10-11-2017	15:00	USD	-	90.5
U. of Mich. Sentiment (NOV P)	10-11-2017	15:00	USD	-	100.7

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