



11 Jul.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,784	0.1 %	5.9 %
BSE SENSEX	31,716	1.1 %	6.2 %
CNX BANK	23,671	(0.0) %	9.9 %
CNX MIDCAP	18,289	0.2 %	5.5 %
CNX SMALLCAP	7,617	0.3 %	7.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,409	(0.0) %	7.7 %
S&P 500	2,427	0.1 %	7.5 %
FTSE 100	7,370	0.3 %	2.7 %
HANG SENG	25,500	0.6 %	15.1 %
NIKKEI	20,081	0.8 %	2.5 %
SHANGHAI COMPOSITE	3,213	(0.2) %	2.4 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.53	(0.4) %	(4.3) %
EUR/USD	1.14	(0.1) %	7.5 %
GBP/USD	1.29	(0.7) %	4.7 %
USD/JPY	114.14	0.3 %	(1.6) %
USD/AUD	1.31	(0.4) %	(4.0) %
USD/SGD	1.38	0.1 %	(3.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	44	0.4 %	(15.2) %
Gold(INR/10g)	27,719	(1.0) %	(0.3) %
Gold Comex(USD/oz)	1,211	(0.1) %	4.6 %
SILVER(INR/1Kg)	35,712	(3.1) %	(8.2) %
Aluminium(USD/MT)	1,914	(0.3) %	12.5 %
Copper(USD/MT)	5,780	(0.5) %	3.7 %

**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:** The Organization for Economic Co-operation and Development (OECD) area composite leading indicator signalled stable pace of expansion in the region. The composite leading index, designed to anticipate turning points in economic activity relative to trend six to nine months ahead, held steady at 100.0 in May. Stable growth momentum remains the assessment for Japan, Canada and for the euro area as a whole. However, the index suggested easing in the United States and the United Kingdom. The CLI for Germany continues to point to growth gaining momentum, which is now also the assessment for France. The index signalled growth gaining momentum in China. In India, the CLI points to stable growth momentum. Consumer credit in the U.S. increased by much more than expected in the month of May, according to a report released by the Federal Reserve on Monday. The Fed said consumer credit jumped by \$18.4 billion in May.

**Global Equities:** US stocks moved modestly higher. While the Dow ended the day roughly flat, the broader Nasdaq and S&P 500 closed in positive territory.

**Indian Economy:** The RBI data shows that the volume of digital payments has recorded a CAGR of 28 per cent during the five year period ending 2015-16. In contrast, the increase has been a whopping 55 per cent in 2016-17, according to an analysis and evaluation of the current digital payments landscape in the country as captured by NITI Aayog. Further, the value of overall payments was around 13 to 14 times of GDP during the five-year period.

**Equity Markets:** The BSE Sensex logged strong gains on first trading day of the week on steady buying in TCS, Infosys and Bharti Airtel. Trading was halted temporarily in both cash and derivatives segment of NSE due to technical reasons. National Stock Exchange (NSE) in a press release issued today, 10 July 2017, said that cash market segment did not function normally due to technical problem. The matter is being examined by the internal technical team and external vendors, to analyse and identify the cause which led to the issue and to suggest solutions to prevent recurrence, NSE said.

**Corporate News:** IndusInd Bank is scheduled to announce Q1 June 2017 earnings today, 11 July 2017. State Bank of India's (SBI) executive committee of the central board has given the final approval for divestment of 8 crore shares in SBI Life through an initial public offering (IPO). The shares being offered for sale by SBI will be available at a price that would be fixed and determined by SBI Life, SBI, and BNP Paribas Cardiff, in consultation with the book-running lead managers, SBI said. Bharti Airtel announced the launch of Project Next - its digital innovation program aimed at transforming customer experience across all of its services and touch points. Airtel said it plans to invest up to Rs 2000 crore over the next 3 years under Project Next to launch several exciting digital innovations to step change the simplicity and interactivity of the Airtel customer experience. Project Next complements Airtel's massive investments towards building a future ready network under Project Leap. Reliance Power said it has redeemed and paid interest in respect of its 2500 -10.20% unsecured redeemable non-convertible debentures series I (2016) of Rs 10 lakh each aggregating to Rs 250 crore on the due date 10 July 2017.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(64.9)	(53.8)	23.2
MF(INR cr)	790.2	473.8	486.0

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	72,479	34,070	29,886
F&O(INR cr)	333,398	459,214	530,278

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.1	11.4	11.4
NSE VIX	10.9	11.1	11.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,675	1.0 %	9.9 %	Energy	12,131	0.6 %	2.6 %
IT	10,360	2.7 %	(2.2) %	Pharma	9,884	1.7 %	(5.9) %
Metals	3,130	1.4 %	0.8 %	Finance	9,634	0.7 %	9.2 %
Auto	10,795	0.6 %	8.8 %	PSU	3,475	2.8 %	(1.4) %
FMCG	27,475	0.0 %	16.2 %	Real Estate	282	0.7 %	28.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Divi's Lab	735	8.1 %	17.2 %	Shriram Tr	1,056	(3.1) %	(4.4) %
Punjab Nat	153	6.3 %	2.2 %	Piramal En	2,901	(1.5) %	49.9 %
Bharti Air	406	5.1 %	18.7 %	Interglobe	1,239	(0.7) %	18.8 %
Idea Cellu	87	4.6 %	2.5 %	Shree Ceme	18,250	(0.6) %	6.3 %
TCS	2,435	4.4 %	1.0 %	M & M	1,367	(0.6) %	6.3 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (MAY)	11-07-2017	1:30	AUD	-	(0.019)
Investment Lending (MAY)	11-07-2017	1:30	AUD	-	(0.023)
NAB Business Conditions (JUN)	11-07-2017	1:30	AUD	-	12
NAB Business Confidence (JUN)	11-07-2017	1:30	AUD	-	7
Value of Loans (MoM) (MAY)	11-07-2017	1:30	AUD	-	(0.011)
Housing Starts (JUN)	11-07-2017	12:15	CAD	-	-
BOE's Andy Haldane speaks in London	11-07-2017	9:00	GBP	-	-
BOE's Ben Broadbent speaks in Aberdeen	11-07-2017	11:00	GBP	-	-
Domestic Corporate Goods Price Index (MoM) (JUN)	11-07-2017	23:50	JPY	-	0
Domestic Corporate Goods Price Index (YoY) (JUN)	11-07-2017	23:50	JPY	-	0.021
Machine Tool Orders (YoY) (JUN P)	11-07-2017	6:00	JPY	-	0.245
ANZ Truckometer Heavy (MoM) (JUN)	11-07-2017	22:00	NZD	-	0.041
Fed's Brainard Speaks on Monetary Policy in New York	11-07-2017	16:30	USD	-	-
Fed's Williams Speaks in Sydney	11-07-2017	3:05	USD	-	-
JOLTS Job Openings (MAY)	11-07-2017	14:00	USD	-	6044
NFIB Small Business Optimism (JUN)	11-07-2017	10:00	USD	-	104.5
U.S. to Sell 4-Week Bills	11-07-2017	15:30	USD	-	-
U.S. to Sell USD24 Bln 3-Year Notes	11-07-2017	17:00	USD	-	-
Wholesale Inventories (MAY F)	11-07-2017	14:00	USD	-	0.003
Wholesale Trade Sales (MoM) (MAY)	11-07-2017	14:00	USD	-	(0.004)

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