



11 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,820	(0.9) %	6.3 %
BSE SENSEX	31,531	(0.8) %	5.4 %
CNX BANK	24,217	(0.6) %	12.4 %
CNX MIDCAP	17,463	(3.2) %	0.7 %
CNX SMALLCAP	7,169	(4.6) %	1.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,844	(0.9) %	9.9 %
S&P 500	2,438	(1.5) %	8.0 %
FTSE 100	7,390	(1.4) %	3.0 %
HANG SENG	27,444	(1.1) %	23.9 %
NIKKEI	19,730	(0.1) %	0.7 %
SHANGHAI COMPOSITE	3,262	(0.4) %	4.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.08	0.7 %	(5.0) %
EUR/USD	1.18	0.4 %	11.0 %
GBP/USD	1.30	(0.0) %	5.6 %
USD/JPY	109.07	(0.6) %	(6.0) %
USD/AUD	1.27	0.3 %	(6.9) %
USD/SGD	1.36	(0.1) %	(4.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	0.8 %	(5.3) %
Gold(INR/10g)	28,901	1.2 %	3.9 %
Gold Comex(USD/oz)	1,282	0.9 %	10.8 %
SILVER(INR/1Kg)	38,886	2.9 %	(0.1) %
Aluminium(USD/MT)	2,018	1.9 %	18.6 %
Copper(USD/MT)	6,465	1.6 %	16.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	(0.0) %	(0.2) %

Global Economy: Reflecting a drop in prices for services, the US Labor Department released a report on Thursday showing an unexpected decrease in US producer prices in the month of July. The Labor Department said its producer price index for final demand edged down by 0.1%. First-time claims for US unemployment benefits unexpectedly edged higher in the week ended August 5th. The initial jobless claims crept up to 244,000. The UK economy grew at a slightly slower pace in three months ended July. According to monthly GDP estimates of NIESR, output grew 0.2% in three months to July after expanding 0.3% in the second quarter.

Global Equities: Stocks continue to see notable weakness as geopolitical concerns continue to weigh amid an ongoing escalation in tensions between the US and North Korea.

Indian Economy: The Reserve Bank of India (RBI) trimmed the surplus it transfers to the government by more than half. The bank said it would transfer Rs 30,659 crore to the treasury, down from Rs 65,876 crore a year earlier, the RBI said in a statement. This can push up the borrowings for the fiscal year.

Equity Markets: Key benchmark indices dropped in tandem with global stocks to register losses for fourth day in a row. Global stocks declined on escalating tensions between the US and North Korea. The Sensex hit its lowest closing level in over one month while the Nifty hit almost one-month closing low. Indices traded in the negative terrain throughout the session. Domestic stocks nudged lower in early trade on negative global cues. Key indices cut losses in mid-morning trade after hovering in negative zone in morning trade.

Corporate News: Infrastructure major Punj Lloyd today saw its net loss narrowing to Rs 194.32 crore for the first quarter ended June 30, 2017. The company had clocked a net loss of Rs 211.39 crore in the corresponding quarter of 2016-17. Net sales of the company during the quarter rose to Rs 977.34 crore from Rs 887.57 crore during the corresponding quarter a year ago. The government expects the goods and services tax (GST) and increased surveillance to boost tax revenues over the next two years, taking India's tax-to-GDP ratio close to 12% by FY20. Parliament passed a bill that will empower the RBI to deal with stressed assets in the banking sector which have soared to Rs 8 lakh crore. The Banking Regulation (Amendment) Bill, 2017, which was passed by a voice vote in the Rajya Sabha, replaces an ordinance promulgated in May. The Non-Performing Asset generation of Rural Electrification Corporation and Power Finance Corporation worked out to "a significant 21.72% of the amount disbursed during 2013-2014 to 2015-2016" according to the Comptroller and Auditor General of India. This has been highlighted in the auditor's report on 'Loans to Independent Power Producers (IPP) by Rural Electrification Corporation Ltd and Power Finance Corporation Ltd' that was tabled in the Parliament on Thursday.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(67.3)	3.1	24.9
MF(INR cr)	470.2	638.9	486.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,291	31,080	30,404
F&O(INR cr)	1,157,386	670,348	559,206

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	11.1	10.4	11.1
NSE VIX	13.8	12.4	11.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,217	(0.6) %	12.4 %	Energy	12,805	(1.6) %	8.3 %
IT	10,662	0.5 %	0.7 %	Pharma	8,513	(2.9) %	(19.0) %
Metals	3,329	(1.6) %	7.2 %	Finance	9,923	(1.0) %	12.4 %
Auto	10,607	(2.9) %	6.9 %	PSU	3,461	(2.7) %	(1.8) %
FMCG	24,969	(0.5) %	5.6 %	Real Estate	257	(5.1) %	17.4 %

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>
Tech Mahin	404	2.6 %	(10.8) %	Tata Motor	380	(8.6) %	(19.2) %
Britannia	4,119	1.5 %	21.4 %	Tata Motor	221	(8.6) %	(21.2) %
Infosys	981	1.2 %	(2.7) %	DLF	165	(8.0) %	12.1 %
Wipro	288	0.6 %	13.6 %	Power Fin.	125	(7.1) %	(15.7) %
HCL Techno	883	0.5 %	1.9 %	Havells In	464	(6.9) %	(1.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
German Consumer Price Index (MoM) (JUL F)	11-08-2017	06:00	EUR	-	0.004
German Consumer Price Index (YoY) (JUL F)	11-08-2017	06:00	EUR	-	0.017
German Wholesale Price Index (MoM) (JUL)	11-08-2017	06:00	EUR	-	0
German Wholesale Price Index (YoY) (JUL)	11-08-2017	06:00	EUR	-	0.025
Baker Hughes U.S. Rig Count (AUG 11)	11-08-2017	17:00	USD	-	954
Consumer Price Index (MoM) (JUL)	11-08-2017	12:30	USD	-	0
Consumer Price Index (YoY) (JUL)	11-08-2017	12:30	USD	-	0.016
Consumer Price Index Core Index s.a. (JUL)	11-08-2017	12:30	USD	-	251.627
Consumer Price Index Ex Food & Energy (MoM) (JUL)	11-08-2017	12:30	USD	-	0.001
Consumer Price Index Ex Food & Energy (YoY) (JUL)	11-08-2017	12:30	USD	-	0.017
Consumer Price Index n.s.a. (JUL)	11-08-2017	12:30	USD	-	244.955
Fed's Kaplan Speaks in Arlington, Texas	11-08-2017	13:40	USD	-	-
Fed's Kashkari Speaks to Independent Community Bankers of Minn	11-08-2017	15:30	USD	-	-
Real Avg Hourly Earning (YoY) (JUL)	11-08-2017	12:30	USD	-	0.008
Real Avg Weekly Earnings (YoY) (JUL)	11-08-2017	12:30	USD	-	0.011

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