



11 Oct.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,017	0.3 %	8.4 %
BSE SENSEX	31,924	0.2 %	6.7 %
CNX BANK	24,347	0.4 %	13.0 %
CNX MIDCAP	18,679	0.8 %	7.8 %
CNX SMALLCAP	7,958	0.8 %	12.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,831	0.3 %	14.8 %
S&P 500	2,551	0.2 %	13.0 %
FTSE 100	7,538	0.4 %	5.0 %
HANG SENG	28,491	0.6 %	28.6 %
NIKKEI	20,824	0.6 %	6.3 %
SHANGHAI COMPOSITE	3,383	0.3 %	7.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.36	(0.0) %	(3.1) %
EUR/USD	1.18	0.4 %	11.1 %
GBP/USD	1.32	0.7 %	7.0 %
USD/JPY	112.69	0.0 %	(2.8) %
USD/AUD	1.29	(0.2) %	(6.0) %
USD/SGD	1.36	(0.4) %	(4.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	0.6 %	(5.3) %
Gold(INR/10g)	29,732	0.5 %	6.9 %
Gold Comex(USD/oz)	1,289	0.8 %	11.4 %
SILVER(INR/1Kg)	39,780	0.9 %	2.2 %
Aluminium(USD/MT)	2,135	0.6 %	25.4 %
Copper(USD/MT)	6,607	(0.5) %	18.5 %

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: Global economic upswing has strengthened and is broad-based, the International Monetary Fund (IMF) said Tuesday, as it raised the growth projections for the world economy for this year and next. The growth forecast for this year was raised to 3.6% from 3.5% and the outlook for next year was lifted to 3.7% from 3.6%. The world economy grew 3.2% in 2016, which was the weakest since the global financial crisis. However, the recovery is incomplete, the IMF said, citing low wage growth, challenges faced by commodity exporters, subdued trends of productivity and demographics. UK industrial production climbed 0.2% month-on-month in August, slower than the 0.3% increase seen in July, which was revised up from 0.2%, data from the Office for National Statistics showed Tuesday. It was the fifth successive monthly rise. The expansion was largely driven by manufacturing output, which advanced 0.4%. Meanwhile, mining and quarrying output fell 2%. Year-on-year, industrial production growth improved to 1.6% in August from 1.1% in July. Germany's export growth rose sharply in August. Exports grew a calendar-and-seasonally adjusted 3.1% from July, when they rose 0.2%. Shipments increased for a second straight month and at the fastest pace in a year.

Global Equities: European stocks witnessed cautious moves as the euro rose against the dollar on speculation over the ECB's future course of action. Political worries also remained in place around the globe.

Indian Economy: The International Monetary Fund (IMF) cut India's growth forecast by 0.5 percentage points to 6.7% in 2017. The growth projection for 2017 has been revised down reflecting still lingering disruptions associated with the currency exchange initiative introduced in November 2016, as well as transition costs related to the launch of the national Goods and Services Tax (GST) in July 2017, it said in its October 2017 World Economic Outlook. Earlier, in April, the IMF had pegged India's GDP growth at 7.2% for 2017. The fund also lowered the growth projection for 2018 to 7.4% from its earlier estimate in April and June of 7.7%, which could once again turn India into the fastest growing economy in the world. IMF noted that GST promises the unification of India's vast domestic market, is among several key structural reforms under implementation that are expected to help push growth above 8 per cent in the medium term.

Equity Markets: Local indices settled with modest gains led by gains in index heavyweights Reliance Industries and Infosys. The Nifty settled above the psychological 10,000 mark. The Sensex and the Nifty, both, hit over 2-1/2 week closing high. The Sensex and the Nifty, both, pared gains after hitting their highest intraday levels in more than two weeks in mid-morning trade.

Corporate News: Piramal Pharma Solutions (PPS), a contract development and manufacturing organisation (CDMO) announced investments of \$55 million across its sites in North America and Asia to expand its API manufacturing capabilities and capacities. The company is a part of Piramal Enterprises Ltd. (PEL). Metals and mining counters could be in focus as the global copper prices have edged up to a one month high after recent correction. India is experiencing some of the greatest structural changes as bold new reforms like note ban and GST have put the country firmly on a sustainable growth path, oil cartel Opec's Secretary General Mohammed Barkindo stated, according to media reports.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(67.2)	(92.6)	(15.1)
MF(INR cr)	1,155.5	902.6	627.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	3,898	24,577	30,404
F&O(INR cr)	365,727	476,969	585,486

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.3	9.6	11.1
NSE VIX	11.1	11.6	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,347	0.4 %	13.0 %	Energy	13,380	0.8 %	13.2 %
IT	10,726	0.4 %	1.3 %	Pharma	9,530	0.3 %	(9.3) %
Metals	3,722	0.1 %	19.8 %	Finance	10,020	0.2 %	13.5 %
Auto	11,030	0.2 %	11.2 %	PSU	3,104	0.1 %	(12.0) %
FMCG	25,205	(0.3) %	6.6 %	Real Estate	283	(0.9) %	28.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Avenue Sup	1,185	6.1 %	86.8 %	Idea Cellu	73	(1.7) %	(14.3) %
Havells In	533	5.2 %	13.7 %	A B B	1,354	(1.6) %	2.4 %
UPL	820	3.4 %	11.4 %	Eicher Mot	31,545	(1.0) %	23.5 %
Sun TV Net	818	3.0 %	2.8 %	Hind.Zinc	313	(1.0) %	7.5 %
Ashok Leyl	126	2.1 %	50.4 %	Ambuja Cem	278	(0.9) %	16.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
SNB Presents New 10 Franc Note	11-10-2017	07:30	CHF	-	-
ECB's Praet Speaks in New York	11-10-2017	18:50	EUR	-	-
RICS House Price Balance (SEP)	11-10-2017	23:01	GBP	-	0.06
Bank Lending Banks ex-Trust (SEP)	11-10-2017	23:50	JPY	-	0.032
Bank Lending incl Trusts (YoY) (SEP)	11-10-2017	23:50	JPY	-	0.032
Domestic Corporate Goods Price Index (MoM) (SEP)	11-10-2017	23:50	JPY	-	0
Domestic Corporate Goods Price Index (YoY) (SEP)	11-10-2017	23:50	JPY	-	0.029
Machine Tool Orders (YoY) (SEP P)	11-10-2017	06:00	JPY	-	0.362
Food Prices (MoM) (SEP)	11-10-2017	21:45	NZD	-	0.006
Fed's Evans Speaks on Economy and Monetary Policy	11-10-2017	11:15	USD	-	-
Fed's Kaplan Speaks at Stanford Institute	11-10-2017	00:00	USD	-	-
Fed's Williams Gives Community Leaders Speech	11-10-2017	18:40	USD	-	-
FOMC Meeting Minutes (SEP 20)	11-10-2017	18:00	USD	-	-
JOLTS Job Openings (AUG)	11-10-2017	14:00	USD	-	6170
MBA Mortgage Applications (OCT 06)	11-10-2017	11:00	USD	-	(0.004)
U.S. to Sell 3-Year Notes	11-10-2017	15:30	USD	-	-
U.S. to Sell USD20 Bln 10-Year Notes Reopening	11-10-2017	17:00	USD	-	-

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