



12 Jul.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,814	0.3 %	6.2 %
BSE SENSEX	31,747	0.1 %	6.5 %
CNX BANK	23,626	0.2 %	9.6 %
CNX MIDCAP	18,185	0.5 %	4.9 %
CNX SMALLCAP	7,564	0.5 %	7.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,409	0.0 %	7.7 %
S&P 500	2,426	(0.1) %	7.4 %
FTSE 100	7,330	(0.6) %	2.1 %
HANG SENG	25,878	1.5 %	16.8 %
NIKKEI	20,195	0.6 %	3.1 %
SHANGHAI COMPOSITE	3,203	(0.3) %	2.1 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.59	0.0 %	(4.2) %
EUR/USD	1.15	0.7 %	8.3 %
GBP/USD	1.28	(0.4) %	4.4 %
USD/JPY	113.60	(0.3) %	(2.1) %
USD/AUD	1.31	(0.7) %	(4.5) %
USD/SGD	1.38	(0.1) %	(3.5) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	1.4 %	(13.9) %
Gold(INR/10g)	27,772	0.2 %	(0.1) %
Gold Comex(USD/oz)	1,219	0.6 %	5.3 %
SILVER(INR/1Kg)	36,212	1.4 %	(7.0) %
Aluminium(USD/MT)	1,879	(1.8) %	10.4 %
Copper(USD/MT)	5,795	0.3 %	4.0 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	(0.0) %	(0.1) %

**Global Economy:** The unemployment rate in the Organization for Economic Cooperation and Development area remained stable in May, data showed Tuesday. The OECD said the jobless rate came in at 5.9% in May, the same rate as seen in April. Across the OECD area, 36.8 million people were unemployed, 4.1 million more than in April 2008. In the euro area, the unemployment rate held steady at 9.3%. The rate increased in Japan and Canada, to 3.1% and 6.6%, respectively. Meanwhile, the US jobless rate fell slightly to 4.3% from 4.4%. Wholesale inventories in the US rose by slightly more than anticipated in the month of May, according to a report released by the Commerce Department on Tuesday. The Commerce Department said wholesale inventories climbed by 0.4% in May following a revised 0.4% drop in April.

**Global Equities:** US stocks showed a lack of direction as markets waited for US Federal Reserve chair Janet Yellen's semi-annual testimony to Congress.

**Indian Economy:** Notwithstanding some teething troubles, the GST is saving trucking time on trunk routes, connecting top cities, between 24-36 hours besides saving the fleet owners Rs 5,000 -7,500 per trip by way of corruption at the octroi and sales tax/VAT check posts which have since been dismantled by most of the states, an ASSOCHAM quick check has noted.

**Equity Markets:** Key benchmark indices reported small gains in volatile trade. Both the Sensex and the Nifty trimmed gains in late trade after hitting record high in afternoon trade. The Sensex and the Nifty, both, hit record high on intraday as well as closing basis. Broader market, however, witnessed selling pressure. Most Asian stocks settled higher as investors hold on to their big bets ahead of the earnings season in the US.

**Corporate News:** Tata Steel announced that the company's entire equity stake in a 50% joint venture, viz, Tata Elastron S.A. has been divested to Elastron S.A for a consideration of euro 0.368 million. It is not a related party transaction. Reliance Industries (RIL) will be watched. The company's telecom subsidiary Reliance Jio Infocomm (Jio) announced that Jio Prime Members can enjoy unlimited services for 3 months with Rs 399 plan. The earlier launched Rs 309 plan will provide 2 months of unlimited Jio services. The new set of plan benefits will be available from 11 July and will be applicable for all new as well as existing subscribers. As part of this unlimited benefit, customers can enjoy 1GB data per day at 4G speed followed by unlimited at 128 kbps, unlimited local, STD and national roaming voice calls and unlimited national SMS. Ajanta Pharma said that Ganga Exports, a promoter group entity, has sold 27 lakh equity shares, or 3.07% equity, of the company. Consequent to sale, promoter holding has come down from 73.78% to 70.71% stake in Ajanta Pharma. This sale has been done to provide liquidity to the promoters and the proceeds will be utilized for personal use.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	25.1	(40.7)	23.2
MF(INR cr)	790.2	473.8	486.0

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,946	33,623	29,901
F&O(INR cr)	468,724	460,572	529,373

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.1	11.4	11.4
NSE VIX	10.9	11.0	11.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,585	(0.4) %	9.5 %	Energy	12,160	0.2 %	2.9 %
IT	10,430	0.7 %	(1.5) %	Pharma	9,802	(0.8) %	(6.7) %
Metals	3,115	(0.5) %	0.3 %	Finance	9,605	(0.3) %	8.8 %
Auto	10,876	0.7 %	9.6 %	PSU	3,431	(1.3) %	(2.7) %
FMCG	27,362	(0.4) %	15.7 %	Real Estate	277	(1.5) %	26.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Torrent Ph	1,334	2.5 %	(11.4) %	Shriram Tr	1,014	(3.9) %	(8.2) %
Hindalco I	201	2.5 %	3.6 %	Idea Cellu	84	(3.3) %	(0.9) %
Bajaj Auto	2,793	2.3 %	0.3 %	Power Fin.	123	(2.8) %	(16.6) %
Tata Motor	457	2.2 %	(2.9) %	NHPC Ltd	31	(2.6) %	(2.9) %
B P C L	678	2.1 %	6.3 %	Bharti Air	395	(2.5) %	15.7 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Credit Card Balances (MAY)	12-07-2017	1:30	AUD	-	-
Credit Card Purchases (MAY)	12-07-2017	1:30	AUD	-	-
Westpac Consumer Conf Index (JUL)	12-07-2017	0:30	AUD	-	96.2
Westpac Consumer Confidence (JUL)	12-07-2017	0:30	AUD	-	(0.018)
Bank of Canada Rate Decision (JUL 12)	12-07-2017	14:00	CAD	-	0.005
Bank of Canada Releases July Monetary Policy Report	12-07-2017	14:00	CAD	-	-
BOC's Poloz and Wilkins Hold Press Conference in Ottawa	12-07-2017	15:15	CAD	-	-
Teranet/National Bank HP Index (JUN)	12-07-2017	12:30	CAD	-	210.92
Teranet/National Bank HPI (MoM) (JUN)	12-07-2017	12:30	CAD	-	0.022
Teranet/National Bank HPI (YoY) (JUN)	12-07-2017	12:30	CAD	-	0.139
Euro-Zone Industrial Production s.a. (MoM) (MAY)	12-07-2017	9:00	EUR	-	0.005
Euro-Zone Industrial Production w.d.a. (YoY) (MAY)	12-07-2017	9:00	EUR	-	0.014
German Wholesale Price Index (MoM) (JUN)	12-07-2017	6:00	EUR	-	(0.007)
German Wholesale Price Index (YoY) (JUN)	12-07-2017	6:00	EUR	-	0.031
Average Weekly Earnings (3M/YoY) (MAY)	12-07-2017	8:30	GBP	-	0.021
Claimant Count Rate (JUN)	12-07-2017	8:30	GBP	-	0.023
Employment Change (3M/3M) (MAY)	12-07-2017	8:30	GBP	-	-
ILO Unemployment Rate (3M) (MAY)	12-07-2017	8:30	GBP	-	0.046
Jobless Claims Change (JUN)	12-07-2017	8:30	GBP	-	-
RICS House Price Balance (JUN)	12-07-2017	23:01	GBP	-	0.17
Weekly Earnings ex Bonus (3M/YoY) (MAY)	12-07-2017	8:30	GBP	-	0.017
Foreign Buying Japan Bonds (Yen) (JUL 07)	12-07-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (JUL 07)	12-07-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUL 07)	12-07-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUL 07)	12-07-2017	23:50	JPY	-	-
Tertiary Industry Index (MoM) (MAY)	12-07-2017	4:30	JPY	-	0.012
Food Prices (MoM) (JUN)	12-07-2017	22:45	NZD	-	0.024
DOE Cushing OK Crude Inventory (JUL 07)	12-07-2017	14:30	USD	-	-
DOE US Crude Oil Inventories (JUL 07)	12-07-2017	14:30	USD	-	-



DOE U.S. Distillate Inventory (JUL 07)	12-07-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUL 07)	12-07-2017	14:30	USD	-	-
Fed Releases Chair Yellen's testimony to Congress	12-07-2017	12:30	USD	-	-
Fed's George Speaks in Denver on the Economic Outlook	12-07-2017	18:15	USD	-	-
MBA Mortgage Applications (JUL 07)	12-07-2017	11:00	USD	-	0.014
U.S. Federal Reserve Releases Beige Book	12-07-2017	18:00	USD	-	-
U.S. to Sell USD20 Bln 10-Year Notes Reopening	12-07-2017	17:00	USD	-	-
Yellen to Appear Before U.S. House Panel	12-07-2017	14:00	USD	-	-

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