



12 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,006	0.0 %	8.3 %
BSE SENSEX	31,882	0.6 %	6.6 %
CNX BANK	24,672	0.0 %	14.5 %
CNX MIDCAP	18,735	0.0 %	8.1 %
CNX SMALLCAP	7,919	0.0 %	12.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,057	1.2 %	10.9 %
S&P 500	2,488	1.1 %	10.2 %
FTSE 100	7,414	0.5 %	3.3 %
HANG SENG	27,955	1.0 %	26.2 %
NIKKEI	19,546	1.4 %	(0.2) %
SHANGHAI COMPOSITE	3,376	0.3 %	7.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.93	(0.2) %	(5.2) %
EUR/USD	1.20	(0.6) %	12.7 %
GBP/USD	1.32	0.5 %	7.1 %
USD/JPY	109.38	0.9 %	(5.7) %
USD/AUD	1.25	0.7 %	(8.7) %
USD/SGD	1.35	0.5 %	(5.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	47	0.0 %	(9.3) %
Gold(INR/10g)	30,092	(1.0) %	8.2 %
Gold Comex(USD/oz)	1,351	(0.2) %	16.8 %
SILVER(INR/1Kg)	40,554	(1.3) %	4.2 %
Aluminium(USD/MT)	2,072	(0.1) %	21.7 %
Copper(USD/MT)	6,780	(0.9) %	21.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.1	0.0 %	(0.4) %

Global Economy: Persistent gains in the euro due to external factors can hurt the outlook for euro area inflation, while an economic improvement could offset the negative impact of a strong currency arising from expectations of tighter policy stance in future, European Central Bank Executive Board member Benoit Coeure said Monday. Japan core machine orders surged a seasonally adjusted 8% on month in July, standing at 853.3 billion yen, the Cabinet Office said on Monday, following the 1.9% decline in June. On a yearly basis, core machine orders tumbled 7.5%, following the 5.2% decline in the previous month. Japan's tertiary industry activity index gained 0.1 percent month-on-month in July, reversing a 0.2% drop in June and flat growth in May, data from the Ministry of Economy, Trade and Industry showed. Broad-ranging personal services climbed 0.5%, while broad ranging business services showed nil growth in July. On a yearly basis, the growth in tertiary activity stabilized at 1% in July.

Global Equities: US stocks jumped following the modest pullback in last week. DOW jumped 1.2% to end firmly above the 22000 levels.

Indian Economy: Insolvency and Bankruptcy Board of India (IBBI) needs to quickly provide for a cross-border insolvency framework as many of the existing insolvency cases have foreign creditors, the existing provisions of code may not be adequate, according to an ASSOCHAM-EY joint study.

Courts in foreign jurisdictions may not recognize the restructuring plan approved by the NCLT in India. Further, the moratorium clause in IBC would not stop foreign creditors from filing suits in foreign courts. It will be cumbersome and costly for RPs to manage such litigation, reveals the joint study on 'Experiencing the Code Corporate Insolvency in India'.

Equity Markets: Key benchmark indices logged modest gains on positive global cues. The Nifty settled above the the psychologically important 10,000 mark. PSU bank stocks saw mixed trend. Private bank stocks rose. Capital goods stocks edged higher. Most auto stocks rose after getting relief from the less than expected hike in cess on cars and SUVs by the GST Council. Cement stocks were in demand.

Corporate News: Wipro announced the launch of an Automotive Center of Excellence (CoE) in Timisoara, Romania. This CoE will help Wipro deliver innovative embedded software solutions for its global and European clients. This engineering center in Romania is part of Wipro's global delivery network that offers best-in-class engineering and IT services. ICICI Bank said that the committee of executive directors constituted by the board of the bank is scheduled to have a meeting on 12 September 2017 to consider fund raising by way of issuance of Basel III compliant unsecured subordinated perpetual additional Tier 1 bonds in single/multiple tranches on private placement basis. Indiabulls Real Estate through its wholly-owned subsidiary, Ashkit Properties, has acquired a prime commercial land admeasuring 13,519 square meters on National Highway 8 (Plot No 20, situated in Sector 18, Urban Estate, Gurugram).



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(19.8)	(91.9)	(3.3)
MF(INR cr)	364.7	375.8	564.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	3,814	25,935	30,020
F&O(INR cr)	482,710	483,033	573,474

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.1	11.3	11.3
NSE VIX	12.4	12.7	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,672	1.2 %	14.5 %	Energy	13,239	0.7 %	12.0 %
IT	10,460	0.0 %	(1.3) %	Pharma	8,804	(0.4) %	(16.2) %
Metals	3,675	0.6 %	18.3 %	Finance	10,186	0.6 %	15.4 %
Auto	10,840	0.6 %	9.3 %	PSU	3,219	(0.0) %	(8.7) %
FMCG	25,550	0.6 %	8.1 %	Real Estate	287	0.7 %	31.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Petronet L	238	6.1 %	14.8 %	Cadila Hea	477	(4.9) %	7.7 %
IndusInd B	1,791	5.6 %	27.6 %	Glenmark P	571	(1.6) %	(33.4) %
Oil India	331	5.0 %	0.3 %	GlaxoSmith	5,100	(1.5) %	(1.6) %
Tata Power	81	4.7 %	(9.6) %	Torrent Ph	1,192	(1.4) %	(20.8) %
Siemens	1,332	4.2 %	2.3 %	Idea Cellu	79	(1.2) %	(7.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Australia Manpower Survey (4Q)	12-09-2017	0:01	AUD	-	0.07
Credit Card Balances (JUL)	12-09-2017	1:30	AUD	-	-
Credit Card Purchases (JUL)	12-09-2017	1:30	AUD	-	-
NAB Business Conditions (AUG)	12-09-2017	1:30	AUD	-	15
NAB Business Confidence (AUG)	12-09-2017	1:30	AUD	-	12
Manpower Survey (4Q)	12-09-2017	0:01	CNY	-	0.05
ECB Vice President Constancio Speaks in Frankfurt	12-09-2017	13:45	EUR	-	-
Germany Fourth Quarter Manpower Employment Outlook	12-09-2017	23:01	EUR	-	-
BOE Markets Director Salmon Speaks in Barcelona	12-09-2017	9:20	GBP	-	-
Consumer Price Index (MoM) (AUG)	12-09-2017	8:30	GBP	-	(0.001)
Consumer Price Index (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.026
Core Consumer Price Index (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.024
CPIH (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.026
House Price Index (YoY) (JUL)	12-09-2017	8:30	GBP	-	0.049
Producer Price Index Input n.s.a. (MoM) (AUG)	12-09-2017	8:30	GBP	-	0
Producer Price Index Input n.s.a. (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.065
Producer Price Index Output Core n.s.a. (MoM) (AUG)	12-09-2017	8:30	GBP	-	0.001
Producer Price Index Output Core n.s.a. (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.024
Producer Price Index Output n.s.a. (MoM) (AUG)	12-09-2017	8:30	GBP	-	0.001
Producer Price Index Output n.s.a. (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.032
Retail Price Index (AUG)	12-09-2017	8:30	GBP	-	272.9
Retail Price Index (MoM) (AUG)	12-09-2017	8:30	GBP	-	0.002
Retail Price Index (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.036
Retail Price Index Ex Mort Int.Payments (YoY) (AUG)	12-09-2017	8:30	GBP	-	0.039
BSI Large All Industry (QoQ) (3Q)	12-09-2017	23:50	JPY	-	(2)
BSI Large Manufacturing (QoQ) (3Q)	12-09-2017	23:50	JPY	-	(2.9)
Domestic Corporate Goods Price Index (MoM) (AUG)	12-09-2017	23:50	JPY	-	0.003
Domestic Corporate Goods Price Index (YoY) (AUG)	12-09-2017	23:50	JPY	-	0.026
Japan Manufacturing Survey (4Q)	12-09-2017	0:01	JPY	-	24



Food Prices (MoM) (AUG)	12-09-2017	22:45	NZD	-	(0.002)
New Zealand Manpower Survey (4Q)	12-09-2017	0:01	NZD	-	0.12
JOLTS Job Openings (JUL)	12-09-2017	14:00	USD	-	6163
NFIB Small Business Optimism (AUG)	12-09-2017	10:00	USD	-	105.2
U.S. to Sell 4-Week Bills	12-09-2017	15:30	USD	-	-
U.S. to Sell USD20 Bln 10-Year Notes Reopening	12-09-2017	17:00	USD	-	-
U.S. to Sell USD20 Bln 52-Week Bills	12-09-2017	15:30	USD	-	-

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