



12 Oct.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,985	0.0 %	8.1 %
BSE SENSEX	31,834	(0.3) %	6.6 %
CNX BANK	24,107	0.0 %	11.9 %
CNX MIDCAP	18,480	0.0 %	6.6 %
CNX SMALLCAP	7,848	0.0 %	11.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,873	0.2 %	15.0 %
S&P 500	2,555	0.2 %	13.2 %
FTSE 100	7,534	(0.1) %	5.0 %
HANG SENG	28,390	(0.4) %	28.2 %
NIKKEI	20,881	0.3 %	6.6 %
SHANGHAI COMPOSITE	3,388	0.2 %	8.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.14	(0.3) %	(3.4) %
EUR/USD	1.19	0.8 %	12.0 %
GBP/USD	1.32	0.7 %	7.7 %
USD/JPY	112.41	(0.3) %	(3.1) %
USD/AUD	1.28	(0.3) %	(6.3) %
USD/SGD	1.35	(0.4) %	(5.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	0.7 %	(2.0) %
Gold(INR/10g)	29,659	(0.2) %	6.6 %
Gold Comex(USD/oz)	1,296	0.4 %	12.0 %
SILVER(INR/1Kg)	39,785	0.0 %	2.2 %
Aluminium(USD/MT)	2,124	(0.4) %	24.8 %
Copper(USD/MT)	6,685	0.7 %	19.9 %

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: The Fed is likely to raise rates so long as the medium-term economic outlook remains unchanged, according to the minutes of its latest meeting. The Fed noted that recent hurricanes had not disrupted that outlook and it expects slower growth for a few months, but does not expect a long-term effect. The German economy gained momentum and it is set to continue to grow in coming years, the Economy Ministry said Wednesday. Gross domestic product is forecast to grow 2% this year instead of 1.5% projected earlier. The outlook for 2018 was also raised to 1.9% from 1.6%. The German exports of goods and services are expected to grow 3.5% in 2017 and 4% in 2018. Eurozone house prices increased 3.8% year-on-year in the second quarter, the same rate as seen in the first quarter, Eurostat reported Wednesday. On a quarterly basis, growth in house prices accelerated to 1.5 percent from 0.3% in the first quarter. A similar faster growth was last seen in the second quarter of 2016. Japan core machine orders jumped a seasonally adjusted 3.4% on month in August, coming in at 882.4 billion yen, the Cabinet Office said, following the 8% surge in July. On a yearly basis, core machine orders advanced 4.4 percent, following the 7.5% decline in the previous month.

Global Equities: European stocks remained nervous as Euro surged to a two-week high against the dollar after Catalan issue eased a bit.

Indian Economy: The provisional figures of Direct Tax collections up to September, 2017 show that net collections are at Rs. 3.86 lakh crore which is 15.8% higher than the net collections for the corresponding period of last year. Net Direct Tax collections represent 39.4% of the total Budget Estimates of Direct Taxes for F.Y. 2017-18 (Rs. 9.8 lakh crore). Gross collections (before adjusting for refunds) have increased by 10.3% to Rs. 4.66 lakh crore during April to September, 2017. An amount of Rs. 1.77 lakh crore has been received as Advance Tax up to 30th September, 2017 reflecting a growth of 11.5% over the Advance Tax payments of the corresponding period of last year. The growth in Corporate Income Tax (CIT) Advance Tax is 8.1% and that in Personal Income Tax (PIT) Advance Tax is 30.1%.

Equity Markets: Late selling hit local stocks yesterday. Local indices logged modest losses in volatile trade led by slide in bank stocks. The Nifty settled below the psychologically important 10,000 mark. Realty stocks dropped sharply too. The Sensex ended below the psychologically important 32,000 mark after breaching that level in opening trade. The Nifty also ended below the psychologically important 10,000 mark. The Sensex and the Nifty, both declined in afternoon trade after hitting their highest intraday levels in more than two weeks in morning trade.

Corporate News: The First Meeting of the Economic Advisory Council to the Prime Minister chaired by Bibek Debroy, Member NITI Aayog, identified major priorities for accelerating economic growth and employment over the next six months, with greater last mile connectivity. In his presentation, Chief Economic Advisor Arvind Subramanian focused attention on accelerating economic growth, including investments and exports using a combination of different policy levers. The major ports in India have recorded a growth of 3.24% and together handled 326.4 Million Tonnes of cargo during the period April to September, 2017 as against 316.1 Million Tonnes handled during the corresponding period of previous year. Pharma major Pfizer Inc said it is reviewing various strategic alternatives for its consumer healthcare business, including sale or separation of the vertical. Lakshmi Vilas Bank reported 83.4% fall in its net profit at Rs 10.5 crore during the second quarter ended September. Provisioning for bad loans and contingencies spiked to Rs 187.38 crore for the second quarter of 2017-18, as against Rs 62.57 crore in the same period year ago.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(61.9)	(87.4)	(15.5)
MF(INR cr)	197.9	630.7	619.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,455	29,898	30,644
F&O(INR cr)	798,480	522,900	587,111

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.1	9.7	11.1
NSE VIX	11.7	11.6	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,107	(1.0) %	11.9 %	Energy	13,390	0.1 %	13.3 %
IT	10,785	0.6 %	1.8 %	Pharma	9,441	(0.9) %	(10.1) %
Metals	3,668	(1.4) %	18.1 %	Finance	9,958	(0.6) %	12.8 %
Auto	10,960	(0.6) %	10.5 %	PSU	3,030	(2.4) %	(14.1) %
FMCG	25,188	(0.1) %	6.5 %	Real Estate	277	(1.9) %	26.4 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Petronet L	258	5.0 %	24.6 %	Sun TV Net	784	(4.2) %	(1.5) %
Bharti Air	404	4.9 %	18.1 %	Punjab Nat	132	(3.9) %	(12.2) %
H P C L	455	4.2 %	31.6 %	S A I L	55	(3.9) %	(13.2) %
Bharti Inf	411	2.7 %	24.6 %	LIC Housin	638	(3.7) %	2.0 %
Avenue Sup	1,213	2.4 %	91.3 %	Yes Bank	363	(2.7) %	17.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (OCT)	12-10-2017	00:00	AUD	-	0.038
Credit Card Balances (AUG)	12-10-2017	00:30	AUD	-	-
Credit Card Purchases (AUG)	12-10-2017	00:30	AUD	-	-
Home Loans (AUG)	12-10-2017	00:30	AUD	-	0.029
Investment Lending (AUG)	12-10-2017	00:30	AUD	-	(0.039)
Value of Loans (MoM) (AUG)	12-10-2017	00:30	AUD	-	0.009
BOC's Wilkins speaks at IIF panel in Washington	12-10-2017	19:15	CAD	-	-
New Housing Price Index (MoM) (AUG)	12-10-2017	12:30	CAD	-	0.004
New Housing Price Index (YoY) (AUG)	12-10-2017	12:30	CAD	-	0.038
Teranet/National Bank HP Index (SEP)	12-10-2017	12:30	CAD	-	222.03
Teranet/National Bank HPI (MoM) (SEP)	12-10-2017	12:30	CAD	-	0.006
Teranet/National Bank HPI (YoY) (SEP)	12-10-2017	12:30	CAD	-	0.131
ECB President Draghi participates in panel in Washington	12-10-2017	14:30	EUR	-	-
ECB's Coeure speaks at panel in Washington	12-10-2017	20:00	EUR	-	-
ECB's Lautenschlaeger speaks at panel in Washington	12-10-2017	20:10	EUR	-	-
ECB's Praet speaks in Washington	12-10-2017	14:30	EUR	-	-
Euro-Zone Industrial Production s.a. (MoM) (AUG)	12-10-2017	09:00	EUR	-	0.001
Euro-Zone Industrial Production w.d.a. (YoY) (AUG)	12-10-2017	09:00	EUR	-	0.032
Bank of England Credit Conditions & Bank Liabilities Surveys	12-10-2017	08:30	GBP	-	-
BOJ Outright Bond Purchase 10~25 Years	12-10-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	12-10-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	12-10-2017	01:10	JPY	-	-
Foreign Buying Japan Bonds (Yen) (OCT 06)	12-10-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (OCT 06)	12-10-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (OCT 06)	12-10-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (OCT 06)	12-10-2017	23:50	JPY	-	-
Japan Money Stock M2+CD (YoY) (SEP)	12-10-2017	23:50	JPY	-	0.04
Japan Money Stock M3 (YoY) (SEP)	12-10-2017	23:50	JPY	-	0.034
Teranet/National Bank HP Index (SEP)	12-10-2017	12:30	USD	-	222.03



Tokyo Avg Office Vacancies (SEP)	12-10-2017	02:00	JPY	-	3.35
ANZ Consumer Confidence (MoM) (OCT)	12-10-2017	00:00	NZD	-	0.029
ANZ Consumer Confidence Index (OCT)	12-10-2017	00:00	NZD	-	129.9
Business NZ Performance of Manufacturing Index (SEP)	12-10-2017	21:30	NZD	-	57.9
Continuing Claims (SEP 30)	12-10-2017	12:30	USD	-	-
DOE Cushing OK Crude Inventory (OCT 06)	12-10-2017	15:00	USD	-	-
DOE U.S. Crude Oil Inventories (OCT 06)	12-10-2017	15:00	USD	-	-
DOE U.S. Distillate Inventory (OCT 06)	12-10-2017	15:00	USD	-	-
DOE U.S. Gasoline Inventories (OCT 06)	12-10-2017	15:00	USD	-	-
EIA Natural Gas Storage Change (OCT 06)	12-10-2017	14:30	USD	-	42
EIA Working Natural Gas Implied Flow (OCT 06)	12-10-2017	14:30	USD	-	42
Fed's Brainard Speak on Monetary Policy Panel with ECB's Draghi	12-10-2017	14:30	USD	-	-
Fed's Powell Speaks on Prospects for Emerging Market Economies	12-10-2017	14:30	USD	-	-
Initial Jobless Claims (OCT 07)	12-10-2017	12:30	USD	-	-
PPI Ex Food and Energy (MoM) (SEP)	12-10-2017	12:30	USD	-	0.001
PPI Ex Food and Energy (YoY) (SEP)	12-10-2017	12:30	USD	-	0.02
PPI Ex Food, Energy, Trade (MoM) (SEP)	12-10-2017	12:30	USD	-	0.002
PPI Ex Food, Energy, Trade (YoY) (SEP)	12-10-2017	12:30	USD	-	0.019
PPI Final Demand (MoM) (SEP)	12-10-2017	12:30	USD	-	0.002
PPI Final Demand (YoY) (SEP)	12-10-2017	12:30	USD	-	0.024
U.S. to Sell USD12 Bln 30-Year Bonds Reopening	12-10-2017	17:00	USD	-	-

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