



13 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,816	0.3 %	6.3 %
BSE SENSEX	31,805	0.2 %	6.3 %
CNX BANK	23,695	0.5 %	10.0 %
CNX MIDCAP	18,223	0.7 %	5.1 %
CNX SMALLCAP	7,601	1.0 %	7.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,532	0.6 %	8.3 %
S&P 500	2,443	0.7 %	8.2 %
FTSE 100	7,417	1.2 %	3.3 %
HANG SENG	26,044	0.6 %	17.6 %
NIKKEI	20,098	(0.5) %	2.6 %
SHANGHAI COMPOSITE	3,198	(0.2) %	2.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.59	0.1 %	(4.2) %
EUR/USD	1.15	0.7 %	8.3 %
GBP/USD	1.28	(0.2) %	4.4 %
USD/JPY	113.60	(0.5) %	(2.1) %
USD/AUD	1.31	(0.6) %	(4.5) %
USD/SGD	1.38	(0.3) %	(3.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	1.4 %	(13.9) %
Gold(INR/10g)	27,878	0.4 %	0.2 %
Gold Comex(USD/oz)	1,219	0.6 %	5.3 %
SILVER(INR/1Kg)	36,829	1.7 %	(5.4) %
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: Janet Yellen, the Federal Reserve chairwoman, delivered an upbeat message on the state of the US economy to Congress on Wednesday, highlighting the strength of job growth and indicating that the Fed remained on course to begin reducing its bond holdings in the fall. Yellen added, however, that the Fed was paying close attention to the recent weakness of inflation. While emphasizing that she expected prices to start rising more quickly, she said persistent weakness could lead the Fed to raise interest rates more slowly. The US Federal Reserve stated that a shortage of qualified workers in the US has limited hiring, but there's little evidence firms are raising wages to attract jobseekers. The so-called Beige Book, the Fed's regular survey of business conditions around the country, said economic growth was "slight to moderate" from late May through June. Eurozone industrial production growth improved more than expected in May. Industrial output grew 1.3% on a monthly basis, faster than the revised 0.3% increase seen in April.

Global Equities: US stocks edged up following Yellen comments. With the upward move on the day, the Dow reached a new record closing high.

Indian Economy: The all-India general CPI inflation dipped to fresh record low of 1.54% in June 2017 (new base 2012=100), compared with 2.18% in May 2017. The corresponding provisional inflation rate for rural area was 1.59% and urban area 1.41% in June 2017 as against 2.30% and 2.13% in May 2017. The core CPI inflation eased to 3.75% in June 2017 from 4.14% in May 2017. The cumulative CPI inflation was lower at 2.23% in April-June FY2018 compared with 5.67% in April-June FY2017.

Equity Markets: Key benchmark indices settled with modest gains led by Reliance Industries (RIL) and ICICI Bank. Trading session was quiet as investors awaited industrial output data for the month of May and retail inflation data of June by the government today, 12 July 2017. The Sensex and the Nifty, both, attained record closing high. European stocks rose on gains in energy shares and miners, as well as strong updates from retailers Burberry and B&M.

Corporate News: India's industrial production (base year 2011-12=100) increased at slower pace of 1.7% in May 2017 over May 2016. The manufacturing sector's production rose 1.2% in May 2017. Meanwhile, the electricity generation galloped 8.7%, but mining output declined 0.9% in May 2017. The growth for April 2017 has been revised downwards to 2.8% from 3.1% reported earlier. As per the use-based classification, primary goods output improved 3.4% in May 2017 over a year ago, but the output of capital goods continued to decline for second straight month at (-) 3.9%. Intermediate goods output rose mere 0.7%, while the output of Infrastructure/ construction goods also moved up at subdued pace of 0.1%. The output of consumer non-durable durables increased 7.9%, but that of consumer durable goods declined for sixth straight month at 4.5% in May 2017 over May 2016.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	24.9	(31.3)	23.3
MF(INR cr)	796.8	527.6	490.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,825	33,024	29,886
F&O(INR cr)	554,923	472,366	529,743

MARKET VOLATILITY

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

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,695	0.5 %	10.0 %	Energy	12,318	1.3 %	4.2 %
IT	10,402	(0.3) %	(1.8) %	Pharma	9,818	0.2 %	(6.5) %
Metals	3,127	0.4 %	0.7 %	Finance	9,643	0.4 %	9.3 %
Auto	10,904	0.3 %	9.9 %	PSU	3,477	1.3 %	(1.4) %
FMCG	27,426	0.2 %	16.0 %	Real Estate	278	0.2 %	26.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
H P C L	359	5.5 %	3.9 %	Torrent Ph	1,310	(1.8) %	(12.9) %
ACC	1,706	3.3 %	16.7 %	TCS	2,439	(1.5) %	1.2 %
Interglobe	1,263	3.2 %	21.1 %	M & M	1,377	(1.0) %	7.0 %
Bajaj Fins	4,229	2.6 %	3.2 %	Hero Motoc	3,719	(0.8) %	16.1 %
Bharti Inf	420	2.5 %	27.5 %	Aurobindo	695	(0.8) %	1.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (JUL)	13-07-2017	1:00	AUD	-	0.036
New Housing Price Index (MoM) (MAY)	13-07-2017	12:30	CAD	-	0.008
New Housing Price Index (YoY) (MAY)	13-07-2017	12:30	CAD	-	0.039
Producer & Import Prices (MoM) (JUN)	13-07-2017	7:15	CHF	-	(0.003)
Producer & Import Prices (YoY) (JUN)	13-07-2017	7:15	CHF	-	0.001
German Consumer Price Index (MoM) (JUN F)	13-07-2017	6:00	EUR	-	0.002
German Consumer Price Index (YoY) (JUN F)	13-07-2017	6:00	EUR	-	0.016
Bank of England Credit Conditions & Bank Liabilities Surveys	13-07-2017	8:30	GBP	-	-
Tokyo Avg Office Vacancies (JUN)	13-07-2017	2:00	JPY	-	3.41
ANZ Consumer Confidence (MoM) (JUL)	13-07-2017	1:00	NZD	-	0.031
ANZ Consumer Confidence Index (JUL)	13-07-2017	1:00	NZD	-	127.8
Business NZ Performance of Manufacturing Index (JUN)	13-07-2017	22:30	NZD	-	58.5
Continuing Claims (JUL 01)	13-07-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (JUL 07)	13-07-2017	14:30	USD	-	72
EIA Working Natural Gas Implied Flow (JUL 07)	13-07-2017	14:30	USD	-	72
Fed Chair Yellen Testifies Before Senate Banking Panel	13-07-2017	14:00	USD	-	-
Fed's Brainard Speaks in Cambridge, Mass.	13-07-2017	17:00	USD	-	-
Fed's Evans Speaks at Rocky Mountain Summit in Victor, Idaho	13-07-2017	15:30	USD	-	-
Initial Jobless Claims (JUL 08)	13-07-2017	12:30	USD	-	-
Monthly Budget Statement (JUN)	13-07-2017	18:00	USD	-	-
PPI Ex Food and Energy (MoM) (JUN)	13-07-2017	12:30	USD	-	0.003
PPI Ex Food and Energy (YoY) (JUN)	13-07-2017	12:30	USD	-	0.021
PPI Ex Food, Energy, Trade (MoM) (JUN)	13-07-2017	12:30	USD	-	(0.001)
PPI Ex Food, Energy, Trade (YoY) (JUN)	13-07-2017	12:30	USD	-	0.021
PPI Final Demand (MoM) (JUN)	13-07-2017	12:30	USD	-	0
PPI Final Demand (YoY) (JUN)	13-07-2017	12:30	USD	-	0.024
U.S. to Sell USD12 Bln 30-Year Bonds Reopening	13-07-2017	15:30	USD	-	-

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