



13 Oct.2017

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D  | % YTD  |
|----------------|--------|-------|--------|
| CNX NIFTY      | 10,096 | 1.1 % | 9.3 %  |
| BSE SENSEX     | 32,182 | 1.1 % | 7.6 %  |
| CNX BANK       | 24,361 | 1.1 % | 13.1 % |
| CNX MIDCAP     | 18,683 | 1.1 % | 7.8 %  |
| CNX SMALLCAP   | 7,940  | 1.2 % | 12.3 % |

| GLOBAL INDICES     | LATEST | % 1D    | % YTD  |
|--------------------|--------|---------|--------|
| DOW JONES          | 22,841 | (0.1) % | 14.9 % |
| S&P 500            | 2,551  | (0.2) % | 13.0 % |
| FTSE 100           | 7,556  | 0.3 %   | 5.3 %  |
| HANG SENG          | 28,459 | 0.2 %   | 28.5 % |
| NIKKEI             | 20,955 | 0.4 %   | 6.9 %  |
| SHANGHAI COMPOSITE | 3,386  | (0.1) % | 8.0 %  |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 65.09  | (0.3) % | (3.5) % |
| EUR/USD | 1.19   | 0.4 %   | 11.8 %  |
| GBP/USD | 1.33   | 0.6 %   | 8.0 %   |
| USD/JPY | 112.03 | (0.5) % | (3.4) % |
| USD/AUD | 1.28   | (0.7) % | (6.7) % |
| USD/SGD | 1.35   | (0.3) % | (5.3) % |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 51     | 0.7 %   | (2.0) % |
| Gold(INR/10g)      | 29,732 | 0.2 %   | 6.9 %   |
| 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:** Eurozone industrial production rose 1.4% month-on-month in August, faster than the 0.3% rise seen in July, data from Eurostat showed Thursday. This was the biggest growth since November 2016, when output grew 1.6%. Among components, intermediate goods output climbed 1.2% and capital goods output advanced 3.1%. Likewise, production of durable consumer goods gained 1.3%. On a yearly basis, growth in industrial production improved to 3.8% from 3.6 % in July. Japan's tertiary activity contracted unexpectedly in August. The tertiary industry activity dropped 0.2% month-on-month in August, reversing a 0.1% gain in July.

**Global Equities:** Amid a choppy session, the Dow and the Nasdaq edged up to new record intraday highs. A negative reaction to earnings news from Citigroup (C) and JPMorgan (JPM) also weighed on the markets.

**Indian Economy:** India's consumer price index (CPI) hit a five-month high in August, on continued surge in food items. India's retail inflation or Consumer Price Index (CPI) grew 3.36% in August 2017 as against 2.36% in July 2017 and 5.05% in the corresponding month of the previous year, as per Ministry of Statistics and Program Implementation (MOSPI). Retail food inflation, which accounts for about 54% of the CPI, rose 1.52% in August after prices contracted in the previous three months.

**Equity Markets:** Key benchmark indices logged strong gains led by index heavyweight Reliance Industries and bank stocks. The Nifty attained 3-week closing high above the psychologically important 10,000 mark. The Sensex also settled at three-week high. The Sensex ended above the psychologically important 32,000 mark after breaching that level in mid-afternoon trade. The Nifty ended above the psychologically important 10,000 mark after breaching that level in morning trade.

**Corporate News:** TCS, India's largest IT services firm reported a better than expected 8.4% year-on-year rise in net profit at Rs 6,446 crore for the July-September quarter. Revenue for the reporting period rose 3.2% compared to the previous quarter. The year-on-year revenue rose 4.3% to Rs 30,541 crore for the quarter. The Quick Estimates of Index of Industrial Production (IIP) with base 2011-12 for the month of August 2017 showed that the General Index for the month of August 2017 stands at 121.5, which is 4.3% higher as compared to the level in the month of August 2016. The cumulative growth for the period April-August 2017 over the corresponding period of the previous year stands at 2.2%. IndusInd Bank said that its net profit rose 24.96% to Rs 880.10 crore on 21.08% rise in total income to Rs 5395.52 crore in Q2 September 2017 over Q2 September 2016. The bank's gross non-performing assets (NPAs) rose to Rs 1345.28 crore as on 30 September 2017 as against Rs 1271.68 crore as on 30 June 2017 and Rs 899.01 crore as on 30 September 2016. The Foreign Tourist Arrivals (FTAs) in September, 2017 were 7.23 lakh as compared to FTAs of 6.08 lakh in September, 2016 and 5.43 lakh in September, 2015. The growth rate in FTAs in September, 2017 over September, 2016 is 18.8% compared to 12.1% in September, 2016. FTAs during the period January-September 2017 were 71.20 lakh, up 15.5% over same period of previous year.



## FUND FLOWS

|             | LATEST | MTD    | YTD    |
|-------------|--------|--------|--------|
| FII(USD mm) | 133.2  | (55.9) | (14.4) |
| MF(INR cr)  | 197.9  | 630.7  | 619.0  |

## MARKET TURNOVER

|              | LATEST    | AVG MTD | AVG YTD |
|--------------|-----------|---------|---------|
| Cash(INR cr) | 30,981    | 30,033  | 30,646  |
| F&O(INR cr)  | 1,128,169 | 598,558 | 591,210 |

## MARKET VOLATILITY

|          | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 9.9    | 9.7     | 11.1    |
| NSE VIX  | 11.0   | 11.5    | 11.8    |

## NSE INDICES / SECTORAL PERFORMANCE

|        | LATEST | % 1D  | % YTD  |             | LATEST | % 1D    | % YTD    |
|--------|--------|-------|--------|-------------|--------|---------|----------|
| Banks  | 24,361 | 1.1 % | 13.1 % | Energy      | 13,653 | 2.0 %   | 15.5 %   |
| IT     | 10,881 | 0.9 % | 2.7 %  | Pharma      | 9,577  | 1.4 %   | (8.8) %  |
| Metals | 3,741  | 2.0 % | 20.5 % | Finance     | 10,047 | 0.9 %   | 13.8 %   |
| Auto   | 11,072 | 1.0 % | 11.6 % | PSU         | 3,028  | (0.0) % | (14.1) % |
| FMCG   | 25,474 | 1.1 % | 7.8 %  | Real Estate | 282    | 1.7 %   | 28.6 %   |

## NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D  | % YTD   | TOP LOSERS | LATEST | % 1D    | % YTD    |
|-------------|--------|-------|---------|------------|--------|---------|----------|
| Hindalco I  | 264    | 6.0 % | 36.6 %  | Petronet L | 253    | (1.9) % | 22.3 %   |
| Bharti Inf  | 432    | 5.2 % | 31.1 %  | Power Fin. | 120    | (1.0) % | (18.8) % |
| Avenue Sup  | 1,269  | 4.6 % | 100.0 % | Bharti Air | 400    | (0.8) % | 17.1 %   |
| Reliance I  | 873    | 3.9 % | 27.0 %  | UltraTech  | 3,920  | (0.8) % | (2.7) %  |
| Britannia   | 4,544  | 3.9 % | 34.0 %  | I O C L    | 415    | (0.8) % | 8.9 %    |

## EVENTS CALENDAR

| EVENT   | DATE       | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|---|------------|-----------|--------|--------|----------------|
| RBA Financial Stability Review                        | 13-10-2017 | 00:30     | AUD    | -      | -              |
| Producer & Import Prices (MoM) (SEP)                  | 13-10-2017 | 07:15     | CHF    | -      | 0.003          |
| Producer & Import Prices (YoY) (SEP)                  | 13-10-2017 | 07:15     | CHF    | -      | 0.006          |
| ECB's Constancio attends panel in Washington          | 13-10-2017 | 14:15     | EUR    | -      | -              |
| ECB's Mersch attends conference in Luxembourg         | 13-10-2017 | 09:30     | EUR    | -      | -              |
| German Consumer Price Index (MoM) (SEP F)             | 13-10-2017 | 06:00     | EUR    | -      | 0.001          |
| German Consumer Price Index (YoY) (SEP F)             | 13-10-2017 | 06:00     | EUR    | -      | 0.018          |
| Advance Retail Sales (SEP)                            | 13-10-2017 | 12:30     | USD    | -      | (0.002)        |
| Baker Hughes U.S. Rig Count (OCT 13)                  | 13-10-2017 | 17:00     | USD    | -      | 936            |
| Business Inventories (AUG)                            | 13-10-2017 | 14:00     | USD    | -      | 0.002          |
| Consumer Price Index (MoM) (SEP)                      | 13-10-2017 | 12:30     | USD    | -      | 0.004          |
| Consumer Price Index (YoY) (SEP)                      | 13-10-2017 | 12:30     | USD    | -      | 0.019          |
| Consumer Price Index Core Index s.a. (SEP)            | 13-10-2017 | 12:30     | USD    | -      | 252.54         |
| Consumer Price Index Ex Food & Energy (MoM) (SEP)     | 13-10-2017 | 12:30     | USD    | -      | 0.002          |
| Consumer Price Index Ex Food & Energy (YoY) (SEP)     | 13-10-2017 | 12:30     | USD    | -      | 0.017          |
| Consumer Price Index n.s.a. (SEP)                     | 13-10-2017 | 12:30     | USD    | -      | 245.519        |
| Fed's Evans Speaks on Economy and Monetary Policy     | 13-10-2017 | 14:25     | USD    | -      | -              |
| Fed's Kaplan Speaks in Boston                         | 13-10-2017 | 15:30     | USD    | -      | -              |
| Fed's Powell Speaks at Boston Fed Economic Conference | 13-10-2017 | 17:00     | USD    | -      | -              |
| Real Avg Hourly Earning (YoY) (SEP)                   | 13-10-2017 | 12:30     | USD    | -      | 0.006          |
| Real Avg Weekly Earnings (YoY) (SEP)                  | 13-10-2017 | 12:30     | USD    | -      | 0.009          |
| Retail Sales Control Group (SEP)                      | 13-10-2017 | 12:30     | USD    | -      | (0.002)        |
| Retail Sales Ex Auto and Gas (SEP)                    | 13-10-2017 | 12:30     | USD    | -      | (0.001)        |
| Retail Sales Less Autos (SEP)                         | 13-10-2017 | 12:30     | USD    | -      | 0.002          |
| U. of Mich. 1 Yr Inflation (OCT P)                    | 13-10-2017 | 14:00     | USD    | -      | 0.027          |
| U. of Mich. 5-10 Yr Inflation (OCT P)                 | 13-10-2017 | 14:00     | USD    | -      | 0.025          |
| U. of Mich. Current Conditions (OCT P)                | 13-10-2017 | 14:00     | USD    | -      | 111.7          |
| U. of Mich. Expectations (OCT P)                      | 13-10-2017 | 14:00     | USD    | -      | 84.4           |
| U. of Michigan Confidence (OCT P)                     | 13-10-2017 | 14:00     | USD    | -      | 95.1           |



..... End of Report .....

