



14 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,875	(0.2) %	6.9 %
BSE SENSEX	32,037	0.7 %	7.0 %
CNX BANK	23,920	0.1 %	11.0 %
CNX MIDCAP	18,280	0.0 %	5.5 %
CNX SMALLCAP	7,595	(0.2) %	7.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,553	0.1 %	8.4 %
S&P 500	2,448	0.2 %	8.4 %
FTSE 100	7,413	(0.1) %	3.3 %
HANG SENG	26,346	1.2 %	18.9 %
NIKKEI	20,119	0.1 %	2.7 %
SHANGHAI COMPOSITE	3,218	0.6 %	2.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.44	(0.2) %	(4.4) %
EUR/USD	1.14	(0.2) %	7.6 %
GBP/USD	1.29	0.4 %	5.2 %
USD/JPY	113.40	0.2 %	(2.2) %
USD/AUD	1.29	(0.7) %	(5.5) %
USD/SGD	1.38	(0.2) %	(3.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	1.3 %	(11.9) %
Gold(INR/10g)	27,936	0.2 %	0.4 %
Gold Comex(USD/oz)	1,216	(0.5) %	5.1 %
SILVER(INR/1Kg)	36,911	0.2 %	(5.2) %
Aluminium(USD/MT)	1,911	1.8 %	12.3 %
Copper(USD/MT)	5,902	0.3 %	5.9 %

FIXED INCOME

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

Global Economy: First-time claims for U.S. unemployment benefits saw a modest decrease in the week ended July 8th, according to a report released by the Labor Department on Thursday. The report said initial jobless claims dipped to 247,000, a decrease of 3,000 from the previous week's revised level of 250,000. Meanwhile, the Labor Department said the less volatile four-week moving average rose to 245,750, an increase of 2,250 from the previous week's revised average of 243,500. Continuing claims, a reading on the number of people receiving ongoing unemployment assistance, fell by 20,000 to 1.945 million in the week ended July 1st. The four-week moving average of continuing claims still rose to 1,949,250, an increase of 2,250 from the previous week's revised average of 1,947,000.

Global Equities: US stocks witnessed a relatively lackluster performance during trading on Thursday but managed to end the day modestly higher. The Dow managed to reach another new record closing high.

Indian Economy: The water storage available in 91 major reservoirs of the country for the week ending on July 13, 2017 was 36.108 BCM, which is 23% of total storage capacity of these reservoirs. This percentage was at 21 for the week ending on July 06, 2017. The level of July 13, 2017 was 85% of the storage of corresponding period of last year and 82% of storage of average of last ten years. The total storage capacity of these 91 reservoirs is 157.799 BCM which is about 62% of the total storage capacity of 253.388 BCM which is estimated to have been created in the country.

Equity Markets: Key benchmark indices logged strong gains led by ITC, ICICI Bank and HDFC. The Sensex settled above the psychological 32,000 mark after moving above and below that level during the day. The Sensex and the Nifty, both, hit record high on intraday as well as closing basis. Data showing record low inflation data stoking hopes of an interest-rate cut bolstered sentiment. Expectations of an interest rate cut by the Reserve Bank of India (RBI) next month have risen after latest data showed that retail inflation has eased to a record in June and factory output growth slowed sharply in May.

Corporate News: TCS' consolidated net profit fell 10.13% to Rs 5940 crore on 0.19% decline in net sales to Rs 29584 crore in Q1 June 2017 over Q4 March 2017. The result was announced after market hours yesterday, 13 July 2017. Commenting on the company's Q1 performance, TCS CEO and MD, Rajesh Gopinathan said that the company has seen steady growth across industries in Q1. Robust volumes from major markets driven by good client additions across revenue bands and accelerating Digital adoption among customers have given it the right start to the year. The company had excellent wins across all markets and has a good deal pipeline across industries that position it well for growth in FY18, Gopinathan said. TCS' board declared interim dividend of Rs 7 per share for the year ending March 2018. IT major Infosys is scheduled to announce Q1 June 2017 results today, 14 July 2017. Infibeam Incorporation said its board at a meeting held yesterday, 13 July 2017, approved 10-for-1 stock split. Housing finance major HDFC turns ex-dividend today, 14 July 2017, for final dividend of Rs 15 per share for the year ended March 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	84.8	(16.8)	24.2
MF(INR cr)	322.0	498.2	488.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,707	32,988	29,926
F&O(INR cr)	1,004,542	531,497	536,526

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.9	11.0	11.4
NSE VIX	11.3	11.1	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,889	0.8 %	10.9 %	Energy	12,349	0.2 %	4.5 %
IT	10,441	0.4 %	(1.4) %	Pharma	9,875	0.6 %	(6.0) %
Metals	3,153	0.9 %	1.5 %	Finance	9,729	0.9 %	10.2 %
Auto	10,937	0.3 %	10.2 %	PSU	3,486	0.3 %	(1.1) %
FMCG	27,919	1.8 %	18.1 %	Real Estate	278	0.2 %	27.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HPCL	375	4.4 %	8.5 %	IOCL	381	(3.0) %	(0.1) %
Yes Bank	1,582	4.4 %	2.8 %	ONGC	159	(2.4) %	(14.5) %
Bajaj Fins	4,365	3.2 %	6.5 %	Bharti Inf	411	(2.3) %	24.6 %
ITC	339	3.0 %	20.3 %	Torrent Ph	1,280	(2.3) %	(14.9) %
Bajaj Fin.	1,486	2.9 %	25.7 %	Petronet L	214	(1.5) %	3.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
EU 25 New Car Registrations (JUN)	14-07-2017	6:00	EUR	-	0.076
Euro-Zone Trade Balance (euros) (MAY)	14-07-2017	9:00	EUR	-	-
Euro-Zone Trade Balance s.a. (euros) (MAY)	14-07-2017	9:00	EUR	-	-
Capacity Utilization (MoM) (MAY)	14-07-2017	4:30	JPY	-	0.043
Industrial Production (MoM) (MAY F)	14-07-2017	4:30	JPY	-	(0.033)
Industrial Production (YoY) (MAY F)	14-07-2017	4:30	JPY	-	0.068
Advance Retail Sales (JUN)	14-07-2017	12:30	USD	-	(0.003)
Baker Hughes U.S. Rig Count (JUL 14)	14-07-2017	17:00	USD	-	952
Business Inventories (MAY)	14-07-2017	14:00	USD	-	(0.002)
Capacity Utilization (JUN)	14-07-2017	13:15	USD	-	0.766
Consumer Price Index (MoM) (JUN)	14-07-2017	12:30	USD	-	(0.001)
Consumer Price Index (YoY) (JUN)	14-07-2017	12:30	USD	-	0.019
Consumer Price Index Core Index s.a. (JUN)	14-07-2017	12:30	USD	-	251.329
Consumer Price Index Ex Food & Energy (MoM) (JUN)	14-07-2017	12:30	USD	-	0.001
Consumer Price Index Ex Food & Energy (YoY) (JUN)	14-07-2017	12:30	USD	-	0.017
Consumer Price Index n.s.a. (JUN)	14-07-2017	12:30	USD	-	244.733
Fed's Kaplan Speaks in Mexico City	14-07-2017	13:30	USD	-	-
Industrial Production (JUN)	14-07-2017	13:15	USD	-	0
Manufacturing (SIC) Production (JUN)	14-07-2017	13:15	USD	-	(0.004)
Real Avg Hourly Earning (YoY) (JUN)	14-07-2017	12:30	USD	-	0.006
Real Avg Weekly Earnings (YoY) (JUN)	14-07-2017	12:30	USD	-	0.006
Retail Sales Control Group (JUN)	14-07-2017	12:30	USD	-	0
Retail Sales Ex Auto and Gas (JUN)	14-07-2017	12:30	USD	-	0
Retail Sales Less Autos (JUN)	14-07-2017	12:30	USD	-	(0.003)
U. of Mich. 1 Yr Inflation (JUL P)	14-07-2017	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (JUL P)	14-07-2017	14:00	USD	-	0.025
U. of Mich. Current Conditions (JUL P)	14-07-2017	14:00	USD	-	112.5
U. of Mich. Expectations (JUL P)	14-07-2017	14:00	USD	-	83.9
U. of Michigan Confidence (JUL P)	14-07-2017	14:00	USD	-	05.1



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