



14 Aug.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,711	(1.1) %	5.1 %
BSE SENSEX	31,214	(1.0) %	4.4 %
CNX BANK	23,986	(1.0) %	11.3 %
CNX MIDCAP	17,361	(0.6) %	0.2 %
CNX SMALLCAP	7,166	(0.0) %	1.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,858	0.1 %	9.9 %
S&P 500	2,441	0.1 %	8.1 %
FTSE 100	7,310	(1.1) %	1.8 %
HANG SENG	26,884	(2.0) %	21.4 %
NIKKEI	19,730	(0.1) %	0.7 %
SHANGHAI COMPOSITE	3,209	(1.6) %	2.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.14	0.1 %	(4.9) %
EUR/USD	1.18	0.4 %	11.5 %
GBP/USD	1.30	0.3 %	5.8 %
USD/JPY	109.19	0.1 %	(5.9) %
USD/AUD	1.27	(0.6) %	(7.4) %
USD/SGD	1.36	(0.2) %	(4.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	0.5 %	(6.7) %
Gold(INR/10g)	29,002	0.3 %	4.3 %
Gold Comex(USD/oz)	1,296	0.3 %	12.0 %
SILVER(INR/1Kg)	39,062	0.5 %	0.4 %
Aluminium(USD/MT)	2,041	0.8 %	19.9 %
Copper(USD/MT)	6,354	(1.0) %	14.0 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	(0.0) %	(0.3) %

**Global Economy:** A report released by the Labor Department on Friday showed a modest uptick in consumer prices in the US in the month of July. The Labor Department said its consumer price index inched up by 0.1% in July after coming in unchanged in June. Japan's gross domestic product rose 1% on quarter in the second three months of 2017, the Cabinet Office said in Monday's preliminary reading. That beat forecasts for a gain of 0.6% following the upwardly revised 0.4% increase in the three months prior (originally -0.3%).

**Global Equities:** US stocks saw some strength during trading on Friday. With the upward move, the Nasdaq and the S&P 500 rebounded after ending Thursday's trading at their lowest closing levels in a month.

**Indian Economy:** India's factory output, as measured in the terms of the Index of Industrial Production (IIP), declined by 0.1% in the month of June, compared to a 1.7% rise in the previous, its first fall since June 2013. In terms of industries, eight of the 22 industries showed growth; pharmaceuticals and furniture posted the highest growth followed by tobacco and leather products. A sharp contraction in capital goods production was a sign of concern. Capital goods output shrank 6.8% in June, compared to a 3.9% contraction in the previous month. Output of the manufacturing sector showed negative growth of -0.4% in June from a 1.2% growth in May. Mining output showed signs of positive growth of 0.4% in June compared to a 0.9% contraction in the previous month.

**Equity Markets:** Key benchmark indices registered strong losses on last trading day of the week on weak global cues amid escalating tensions between the US and North Korea. Key indices logged declines for the fifth straight trading session. The Sensex settled at its lowest level in over 5-1/2 weeks. The Nifty settled at 5-week low. Metal and mining stocks dropped heavily.

**Corporate News:** Sun Pharmaceutical Industries' consolidated adjusted net profit excluding the Modafinil settlement fell 74% at Rs 526 crore on 23% decline in sales to Rs 6167 crore in Q1 June 2017 over Q1 June 2016. Net profit for the quarter was adversely impacted by settlements with certain plaintiffs related to the Modafinil antitrust litigation in the US, with the settlement amounting to Rs 950 crore. Net profit for Q1 June 2016 included the benefit of the 180-day exclusivity for Imatinib which expired in July-2016. Adani Ports & Special Economic Zone's consolidated net profit fell 13.7% to Rs 710.25 crore on 50.3% rise in net sales to Rs 2745.14 crore in Q1 June 2017 over Q1 June 2016. Bank of Baroda's net profit fell 52% to Rs 203.39 crore on 1.9% rise in total income to Rs 12103.86 crore in Q1 June 2017 over Q1 June 2016.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(153.8)	(16.5)	22.9
MF(INR cr)	470.2	638.9	486.3

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	37,291	31,770	30,480
F&O(INR cr)	571,219	659,334	559,338

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.5	11.6	11.2
NSE VIX	15.2	12.7	11.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,986	(1.0) %	11.3 %	Energy	12,659	(1.1) %	7.1 %
IT	10,647	(0.1) %	0.5 %	Pharma	8,521	0.1 %	(18.9) %
Metals	3,217	(3.4) %	3.6 %	Finance	9,837	(0.9) %	11.5 %
Auto	10,458	(1.4) %	5.4 %	PSU	3,293	(4.9) %	(6.6) %
FMCG	24,763	(0.8) %	4.8 %	Real Estate	255	(0.9) %	16.3 %

### NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
HPCL	429	4.0 %	24.1 %	Hindalco I	221	(7.1) %	14.2 %
Sun TV Net	707	3.8 %	(11.1) %	Vedanta	279	(6.6) %	2.3 %
Bajaj Fin.	1,695	3.7 %	43.5 %	St Bk of I	280	(5.6) %	(4.4) %
Cadila Hea	483	3.5 %	8.9 %	Power Fin.	118	(5.5) %	(20.3) %
Dr Reddy's	2,011	3.4 %	(26.7) %	DLF	156	(5.5) %	5.9 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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