



14 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,079	(0.1) %	9.1 %
BSE SENSEX	32,186	0.1 %	7.6 %
CNX BANK	24,832	0.2 %	15.2 %
CNX MIDCAP	18,822	(0.6) %	8.6 %
CNX SMALLCAP	7,934	(0.9) %	12.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,158	0.2 %	11.4 %
S&P 500	2,498	0.1 %	10.7 %
FTSE 100	7,380	(0.3) %	2.8 %
HANG SENG	27,894	(0.3) %	25.9 %
NIKKEI	19,866	0.5 %	1.4 %
SHANGHAI COMPOSITE	3,384	0.1 %	7.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.04	0.2 %	(5.0) %
EUR/USD	1.20	0.3 %	13.0 %
GBP/USD	1.33	1.0 %	8.2 %
USD/JPY	110.02	0.6 %	(5.1) %
USD/AUD	1.25	(0.4) %	(9.0) %
USD/SGD	1.34	(0.2) %	(6.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.3 %	(7.8) %
Gold(INR/10g)	30,001	0.4 %	7.9 %
Gold Comex(USD/oz)	1,337	0.5 %	15.5 %
SILVER(INR/1Kg)	40,752	0.9 %	4.7 %
Aluminium(USD/MT)	2,083	(0.8) %	22.4 %
Copper(USD/MT)	6,602	(2.0) %	18.4 %

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: US producer price index edged up by 0.2% in August after slipping by 0.1% in July. Excluding food and energy prices, core producer prices inched up by 0.1 percent in August after dipping by 0.1% in July. Eurozone industrial production increased slightly in July after declining in June, Eurostat reported Wednesday. Industrial production grew 0.1% month-on-month in July, in contrast to a 0.6% drop in June. Among components, capital goods rose 0.8% and intermediate goods rose 0.5%. Durable consumer goods output also advanced 0.7%. The UK jobless rate fell to 4.3%, the lowest since 1975, the Office for National Statistics said. The number of unemployed persons decreased by 75,000 from February-April to 1.46 million in the May to July period. At the same time, the employment rate was 75.3%, the highest since records began in 1971. Average earnings including bonus climbed 2.1% from the previous year, the same rate as in the second quarter.

Global Equities: A rather choppy undertone was seen in global stocks yesterday. In the US, President Donald Trump signed a US\$ 15.25 billion relief package to victims of the Hurricane Harvey, which includes raising the government debt ceiling, according to the White House.

Indian Economy: If India has to maintain a sustained GDP growth of 9-10% per annum, it is crucial that the manufacturing sector grows steadily at 14-15% per annum over the next three decades, noted a recent ASSOCHAM-EY joint study. The joint report stated that while the Goods and Services Tax (GST) has to a large extent addressed prevailing regulatory issues, states across India must individually look into bureaucratic obstacles along with other obstructive regulations and policies on priority, based on their own manufacturing goals.

Equity Markets: Local markets closed with divergent trend after a highly volatile trading session. Index heavyweight Reliance Industries (RIL) hit a record high level in intraday trade. The Sensex gained for fifth day in a row. Trading was volatile throughout the day. Key benchmark indices, which opened lower, gradually rose to hit their fresh intraday highs in mid-afternoon highs. The indices, which were unable to sustain at higher levels, wiped off day's gains and hit fresh intraday low in late trade.

Corporate News: Drug firm Lupin's US arm, Lupin Pharmaceuticals Inc, is recalling 12,888 bottles of Famotidine for oral suspension used in treatment of ulcers from the American market. The reason for the recall is current Good Manufacturing Practise (CGMP) deviations, United States Food and Drug Administration (USFDA) said in its latest Enforcement Report. Metals and mining counters could be under some pressure following the steep slide in Copper. COMEX Copper futures have been slipping after testing a three year high. Prices have taken a backseat after the recent Chinese imports data raised plenty of concerns about the near term demand outlook from the economic giant.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(192.8)	(101.2)	(5.6)
MF(INR cr)	364.7	375.8	564.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,754	27,373	30,062
F&O(INR cr)	658,605	503,332	573,490

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.6	11.1	11.3
NSE VIX	11.8	12.5	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,832	0.2 %	15.2 %	Energy	13,415	0.2 %	13.5 %
IT	10,505	0.0 %	(0.8) %	Pharma	9,141	1.6 %	(13.0) %
Metals	3,671	(1.1) %	18.2 %	Finance	10,246	(0.0) %	16.1 %
Auto	10,916	(0.5) %	10.0 %	PSU	3,272	0.3 %	(7.2) %
FMCG	25,632	(1.1) %	8.4 %	Real Estate	289	(1.3) %	32.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	83	5.0 %	(2.9) %	B P C L	500	(6.3) %	17.5 %
Tata Power	85	4.7 %	(4.9) %	H P C L	458	(5.1) %	32.3 %
Rural Elec	171	4.1 %	(4.7) %	I O C L	416	(4.4) %	9.1 %
Sun Pharma	503	4.1 %	(27.3) %	Emami	1,149	(3.1) %	9.5 %
Reliance I	849	3.1 %	23.5 %	Oil India	324	(2.4) %	(2.1) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (SEP)	14-09-2017	1:00	AUD	-	0.042
Employment Change (AUG)	14-09-2017	1:30	AUD	-	-
Full Time Employment Change (AUG)	14-09-2017	1:30	AUD	-	-
Part Time Employment Change (AUG)	14-09-2017	1:30	AUD	-	-
Participation Rate (AUG)	14-09-2017	1:30	AUD	-	0.651
Unemployment Rate (AUG)	14-09-2017	1:30	AUD	-	0.056
New Housing Price Index (MoM) (JUL)	14-09-2017	12:30	CAD	-	0.002
New Housing Price Index (YoY) (JUL)	14-09-2017	12:30	CAD	-	0.039
SNB 3-Month Libor Lower Target Range (SEP 14)	14-09-2017	7:30	CHF	-	(0.0125)
SNB 3-Month Libor Upper Target Range (SEP 14)	14-09-2017	7:30	CHF	-	(0.0025)
SNB Sight Deposit Interest Rate (SEP 14)	14-09-2017	7:30	CHF	-	(0.0075)
Fixed Assets Ex Rural YTD (YoY) (AUG)	14-09-2017	2:00	CNY	-	0.083
Industrial Production (YoY) (AUG)	14-09-2017	2:00	CNY	-	0.064
Industrial Production YTD (YoY) (AUG)	14-09-2017	2:00	CNY	-	0.068
Retail Sales (YoY) (AUG)	14-09-2017	2:00	CNY	-	0.104
Retail Sales YTD (YoY) (AUG)	14-09-2017	2:00	CNY	-	0.104
ECB Board Member Mersch Speaks in Tallinn	14-09-2017	16:00	EUR	-	-
EU 25 New Car Registrations (AUG)	14-09-2017	6:00	EUR	-	0.021
Bank of England Rate Decision (SEP 14)	14-09-2017	11:00	GBP	-	0.0025
BOE Asset Purchase Target (SEP)	14-09-2017	11:00	GBP	-	-
BOE Corporate Bond Target (SEP)	14-09-2017	11:00	GBP	-	-
Capacity Utilization (MoM) (JUL)	14-09-2017	4:30	JPY	-	0.021
Industrial Production (MoM) (JUL F)	14-09-2017	4:30	JPY	-	(0.008)
Industrial Production (YoY) (JUL F)	14-09-2017	4:30	JPY	-	0.047
Tokyo Condominium Sales (YoY) (AUG)	14-09-2017	4:00	JPY	-	0.033
ANZ Consumer Confidence (MoM) (SEP)	14-09-2017	1:00	NZD	-	0.006
ANZ Consumer Confidence Index (SEP)	14-09-2017	1:00	NZD	-	126.2
Business NZ Performance of Manufacturing Index (AUG)	14-09-2017	22:30	NZD	-	55.4
Consumer Price Index (MoM) (AUG)	14-09-2017	12:30	USD	-	0.001



Consumer Price Index (YoY) (AUG)	14-09-2017	12:30	USD	-	0.017
Consumer Price Index Core Index s.a. (AUG)	14-09-2017	12:30	USD	-	251.914
Consumer Price Index Ex Food & Energy (MoM) (AUG)	14-09-2017	12:30	USD	-	0.001
Consumer Price Index Ex Food & Energy (YoY) (AUG)	14-09-2017	12:30	USD	-	0.017
Consumer Price Index n.s.a. (AUG)	14-09-2017	12:30	USD	-	244.786
Continuing Claims (SEP 02)	14-09-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (SEP 08)	14-09-2017	14:30	USD	-	65
EIA Working Natural Gas Implied Flow (SEP 08)	14-09-2017	14:30	USD	-	65
Initial Jobless Claims (SEP 09)	14-09-2017	12:30	USD	-	-
Real Avg Hourly Earning (YoY) (AUG)	14-09-2017	12:30	USD	-	0.007
Real Avg Weekly Earnings (YoY) (AUG)	14-09-2017	12:30	USD	-	0.011

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