



15 Jun.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,618	0.1 %	4.1 %
BSE SENSEX	31,156	0.2 %	4.2 %
CNX BANK	23,499	0.1 %	9.1 %
CNX MIDCAP	17,932	0.3 %	3.5 %
CNX SMALLCAP	7,398	0.8 %	4.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,375	0.2 %	7.5 %
S&P 500	2,438	(0.1) %	8.0 %
FTSE 100	7,474	(0.4) %	4.1 %
HANG SENG	25,876	0.1 %	16.8 %
NIKKEI	19,884	(0.1) %	1.5 %
SHANGHAI COMPOSITE	3,131	(0.7) %	(0.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.34	(0.2) %	(4.6) %
EUR/USD	1.12	0.2 %	5.8 %
GBP/USD	1.27	0.8 %	3.7 %
USD/JPY	110.06	0.0 %	(5.1) %
USD/AUD	1.33	0.3 %	(3.0) %
USD/SGD	1.38	(0.1) %	(3.4) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	0.8 %	(11.2) %
Gold(INR/10g)	28,822	0.4 %	3.6 %
Gold Comex(USD/oz)	1,272	0.3 %	9.9 %
SILVER(INR/1Kg)	38,814	0.5 %	(0.3) %
Aluminium(USD/MT)	1,877	(0.6) %	10.3 %
Copper(USD/MT)	5,659	(1.6) %	1.5 %

**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:** The Federal Open Market Committee voted to raise fed funds to between 1% and 1.25% and will start "gradual" shrinking of its \$4.5 trillion balance sheet this year. Their so-called 'dot plot' shows one more rate hike in 2017 and three more in 2018, but the Fed's accompanying statement offered little indication they plan to raise interest rates again this summer. Policy makers say they are "monitoring developments closely," meaning they are likely wait for confirmation that recent economic weakness is "transitory." Information received since the Federal Open Market Committee met in May indicates that the labor market has continued to strengthen and that economic activity has been rising moderately so far this year, the Fed noted.

**Global Equities:** The US Fed decision weighed on the markets. US markets showed a lack of direction throughout much of the trading session on Wednesday before ending the session mixed. The Dow still managed to close at a new record closing high.

**Indian Economy:** Commenting on the latest Index of Industrial number, Pankaj Patel, President, FICCI said that overall the industrial growth seems to be stabilising and could pick up momentum if global demand is steady in months to come. Industry is looking forward to forthcoming foreign trade policy review to further encourage manufacturing exports. He noted that a more accommodative monetary policy with lower interest rate would stimulate consumer demand that would hedge any downside risk arising from exports.

**Equity Markets:** Key benchmark indices garnered modest gains after gyrating in a small range during the day as firmness in most global stocks and data showing wholesale price inflation easing in May, supported gains on the bourses. The Sensex rose for the second straight day. The Nifty snapped two-day losing streak.

**Corporate News:** Wipro announced that it has won IT Applications Managed Services engagement with Finnish company, Valmet, a leading global developer and supplier of technologies, automation and services for the pulp, paper, and energy industries. Valmet has selected Wipro as the partner for supporting its renewed Infor LN ERP platform. As part of the multi-year engagement, Wipro will deliver the maintenance and support of the new ERP platforms in a Managed Services model covering all global locations in which Valmet operates. Repco Home Finance announced that the securities allotment committee of the board of directors of the company approved the allotment of 2,720 secured, redeemable, non-convertible, non-cumulative debentures (SRNCD) aggregating to Rs 272 crore on private placement basis to International Finance Corporation. Corporation Bank has revised the bank's tenor based Marginal Cost of Funds based Lending Rate (MCLR) for all new rupee loans and advances including renewals from 15 June 2017.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	761.8	55.5	35.4
MF(INR cr)	(9.3)	344.5	489.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,999	25,963	29,706
F&O(INR cr)	402,757	416,014	510,024

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.4	10.4	11.6
NSE VIX	11.2	11.1	11.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,499	0.1 %	9.1 %	Energy	11,797	1.4 %	(0.2) %
IT	10,366	0.3 %	(2.1) %	Pharma	9,576	(0.2) %	(8.8) %
Metals	2,944	(0.7) %	(5.2) %	Finance	9,617	(0.2) %	9.0 %
Auto	10,905	(0.0) %	9.9 %	PSU	3,478	0.9 %	(1.3) %
FMCG	25,745	(0.8) %	8.9 %	Real Estate	265	1.4 %	20.7 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Reliance I	1,358	3.3 %	(1.2) %	Yes Bank	1,449	(3.0) %	(5.8) %
Punjab Nat	152	2.2 %	1.4 %	Idea Cellu	77	(2.6) %	(9.5) %
ICICI Pru	437	1.9 %	13.4 %	Cadila Hea	529	(2.4) %	19.4 %
Bank of Ba	173	1.8 %	0.2 %	Cipla	540	(2.1) %	(8.9) %
Sun TV Net	827	1.7 %	4.0 %	Container	1,148	(1.8) %	13.5 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (JUN)	15-06-2017	1:00	AUD	-	0.04
Employment Change (MAY)	15-06-2017	1:30	AUD	-	-
Full Time Employment Change (MAY)	15-06-2017	1:30	AUD	-	-
Part Time Employment Change (MAY)	15-06-2017	1:30	AUD	-	-
Participation Rate (MAY)	15-06-2017	1:30	AUD	-	0.648
RBA Foreign Exchange Transaction (Australian dollar) (MAY)	15-06-2017	1:30	AUD	-	-
RBA FX Transactions Government (MAY)	15-06-2017	1:30	AUD	-	-
RBA FX Transactions Other (MAY)	15-06-2017	1:30	AUD	-	-
Unemployment Rate (MAY)	15-06-2017	1:30	AUD	-	0.057
Existing Home Sales (MoM) (MAY)	15-06-2017	13:00	CAD	-	(0.017)
Manufacturing Shipments (MoM) (APR)	15-06-2017	12:30	CAD	-	0.01
Producer & Import Prices (MoM) (MAY)	15-06-2017	7:15	CHF	-	(0.002)
Producer & Import Prices (YoY) (MAY)	15-06-2017	7:15	CHF	-	0.008
SNB 3-Month Libor Lower Target Range (JUN 15)	15-06-2017	7:30	CHF	-	(0.0125)
SNB 3-Month Libor Upper Target Range (JUN 15)	15-06-2017	7:30	CHF	-	(0.0025)
SNB Sight Deposit Interest Rate (JUN 15)	15-06-2017	7:30	CHF	-	(0.0075)
Euro-Zone Trade Balance (euros) (APR)	15-06-2017	9:00	EUR	-	-
Euro-Zone Trade Balance s.a. (euros) (APR)	15-06-2017	9:00	EUR	-	-
Bank of England Rate Decision (JUN 15)	15-06-2017	11:00	GBP	-	0.0025
BOE Asset Purchase Target (JUN)	15-06-2017	11:00	GBP	-	-
BOE Corporate Bond Target (JUN)	15-06-2017	11:00	GBP	-	-
BOE Governor Mark Carney Speaks at Mansion House in London	15-06-2017	20:00	GBP	-	-
Retail Sales (MoM) (MAY)	15-06-2017	8:30	GBP	-	0.02
Retail Sales (YoY) (MAY)	15-06-2017	8:30	GBP	-	0.045
Retail Sales Inc Auto Fuel (MoM) (MAY)	15-06-2017	8:30	GBP	-	0.023
Retail Sales Inc Auto Fuel (YoY) (MAY)	15-06-2017	8:30	GBP	-	0.04
Tokyo Condominium Sales (YoY) (MAY)	15-06-2017	4:00	JPY	-	0.386
Business NZ Performance of Manufacturing Index (MAY)	15-06-2017	22:30	NZD	-	56.8
Capacity Utilization (MAY)	15-06-2017	12:15	USD	-	0.767



Continuing Claims (JUN 03)	15-06-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (JUN 09)	15-06-2017	14:30	USD	-	106
EIA Working Natural Gas Implied Flow (JUN 09)	15-06-2017	14:30	USD	-	106
Empire Manufacturing (JUN)	15-06-2017	12:30	USD	-	(1)
Export Price Index (MoM) (MAY)	15-06-2017	12:30	USD	-	0.002
Export Price Index (YoY) (MAY)	15-06-2017	12:30	USD	-	0.03
Import Price Index (MoM) (MAY)	15-06-2017	12:30	USD	-	0.005
Import Price Index (YoY) (MAY)	15-06-2017	12:30	USD	-	0.041
Import Price Index ex Petroleum (MoM) (MAY)	15-06-2017	12:30	USD	-	0.004
Industrial Production (MAY)	15-06-2017	13:15	USD	-	0.01
Initial Jobless Claims (JUN 10)	15-06-2017	12:30	USD	-	-
Manufacturing (SIC) Production (MAY)	15-06-2017	13:15	USD	-	0.01
NAHB Housing Market Index (JUN)	15-06-2017	14:00	USD	-	70
Net Long-term TIC Flows (APR)	15-06-2017	20:00	USD	-	-
Philadelphia Fed. (JUN)	15-06-2017	12:30	USD	-	38.8
Total Net TIC Flows (APR)	15-06-2017	20:00	USD	-	-

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