



15 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,087	0.1 %	9.2 %
BSE SENSEX	32,242	0.2 %	7.8 %
CNX BANK	24,912	0.3 %	15.6 %
CNX MIDCAP	18,936	0.6 %	9.3 %
CNX SMALLCAP	7,963	0.4 %	12.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,203	0.2 %	11.7 %
S&P 500	2,496	(0.1) %	10.5 %
FTSE 100	7,295	(1.1) %	1.6 %
HANG SENG	27,777	(0.4) %	25.4 %
NIKKEI	19,807	(0.3) %	1.1 %
SHANGHAI COMPOSITE	3,371	(0.4) %	7.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.13	0.1 %	(4.9) %
EUR/USD	1.19	(0.6) %	12.3 %
GBP/USD	1.34	0.7 %	8.9 %
USD/JPY	110.18	0.2 %	(5.0) %
USD/AUD	1.25	0.5 %	(8.6) %
USD/SGD	1.35	0.2 %	(5.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	2.2 %	(5.8) %
Gold(INR/10g)	29,972	(0.1) %	7.8 %
Gold Comex(USD/oz)	1,325	(0.8) %	14.5 %
SILVER(INR/1Kg)	40,494	(0.6) %	4.0 %
Aluminium(USD/MT)	2,083	0.0 %	22.4 %
Copper(USD/MT)	6,527	(1.1) %	17.1 %

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 consumer prices accelerated in August amid a jump in the cost of gasoline and rents, signs of firming inflation that could allow further monetary policy tightening from the Federal Reserve this year. The Labor Department said on Thursday its Consumer Price Index rose 0.4% last month after edging up 0.1% in July. August's gain as the largest in seven months and lifted the year-on-year increase in the CPI to 1.9% from 1.7% in July. Stripping out the volatile food and energy components, consumer prices increased 0.2 percent in August. That followed four straight monthly increases of 0.1%. In the 12 months through August, the so-called core CPI increased 1.7 percent. The year-on-year core CPI has now increased by the same margin for four straight months. While Federal Reserve officials are likely to treat the gasoline-driven rise in the CPI as temporary, they could find some comfort in broad gains in the monthly core CPI.

Global Equities: Broad trend in world market remains choppy on renewed worries about North Korea. A continued slide in copper prices is also weighing on the sentiments.

Indian Economy: Higher inflation in food and fuel products pushed India's wholesale price inflation (WPI) to 3.24% in August from 1.88% in July. Data released by the commerce and industry ministry on Wednesday showed a 4.41% rise in wholesale food inflation in August compared with a 2.12% rise in the trailing month. Food articles inflation rose 5.75%.

Equity Markets: Key benchmark indices ended a volatile trading session with small gains. The Sensex went up for the sixth straight session. Pharma stocks surged with the S&P BSE Healthcare index topping the BSE's 19 sectoral indices. Bank stocks edged higher. Jubilant FoodWorks advanced after the company reassured that all its food ingredients are safe for consumption. Reliance Communications dropped after the Indian unit of Sweden's Ericsson has filed insolvency petitions against RCom and two of its subsidiaries before the National Company Law Tribunal (NCLT) in Mumbai.

Corporate News: Hike in coal production in the last three years has helped mining major Coal India Ltd save Rs 25,900 crore in foreign exchange, interim Chairman and Managing Director Gopal Singh said, according to media reports. India's GDP is likely to remain below 6% threshold in the second quarter of 2017-18 owing to muted agriculture growth and sluggish performance of manufacturing and mining sector, according to SBI's Ecoflash research report. The GDP stood at a three year low at 5.7% for April-June quarter of 2017-18, which the report said has raised concerns about the annual GDP numbers for the fiscal. Steel Authority of India Ltd (SAIL) has reported an 18 per cent jump in sales during August this year over the corresponding period of last financial year. An official statement said that SAIL sold 91,000 tonnes of steel in August 2017. The company targets to sell 1 million tonnes steel through its dealer network in the current financial year and aims at doubling it during the next three financial years.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	404.2	(45.0)	(1.9)
MF(INR cr)	364.7	375.8	564.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,120	27,748	30,072
F&O(INR cr)	1,003,147	553,313	577,293

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.5	11.1	11.3
NSE VIX	11.5	12.4	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,912	0.3 %	15.6 %	Energy	13,365	(0.4) %	13.1 %
IT	10,496	(0.1) %	(0.9) %	Pharma	9,381	2.6 %	(10.7) %
Metals	3,650	(0.6) %	17.5 %	Finance	10,258	0.1 %	16.2 %
Auto	10,949	0.3 %	10.4 %	PSU	3,295	0.7 %	(6.6) %
FMCG	25,628	(0.0) %	8.4 %	Real Estate	288	(0.5) %	31.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Piramal En	2,907	5.4 %	50.2 %	Wipro	283	(4.2) %	11.8 %
Divi's Lab	870	5.0 %	38.7 %	Bharat Ele	190	(2.4) %	18.9 %
Tata Motor	230	4.5 %	(18.2) %	Vedanta	320	(2.3) %	17.2 %
Sun Pharma	525	4.2 %	(24.2) %	Marico	332	(1.8) %	11.9 %
Axis Bank	520	4.1 %	3.8 %	GAIL (Indi	401	(1.7) %	4.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Existing Home Sales (MoM) (AUG)	15-09-2017	13:00	CAD	-	(0.021)
ECB's Lautenschlaeger Speaks in Tallinn	15-09-2017	8:15	EUR	-	-
Euro-Zone Labor Costs (YoY) (2Q)	15-09-2017	9:00	EUR	-	0.015
Euro-Zone Trade Balance (euros) (JUL)	15-09-2017	9:00	EUR	-	-
Euro-Zone Trade Balance s.a. (euros) (JUL)	15-09-2017	9:00	EUR	-	-
BOE's Vlieghe Speaks in London	15-09-2017	8:50	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	15-09-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	15-09-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	15-09-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	15-09-2017	1:10	JPY	-	-
Non Resident Bond Holdings (AUG)	15-09-2017	3:00	NZD	-	0.617
Advance Retail Sales (AUG)	15-09-2017	12:30	USD	-	0.006
Baker Hughes U.S. Rig Count (SEP 15)	15-09-2017	17:00	USD	-	944
Business Inventories (JUL)	15-09-2017	14:00	USD	-	0.005
Capacity Utilization (AUG)	15-09-2017	13:15	USD	-	0.767
Empire Manufacturing (SEP)	15-09-2017	12:30	USD	-	25.2
Industrial Production (AUG)	15-09-2017	13:15	USD	-	0.002
Manufacturing (SIC) Production (AUG)	15-09-2017	13:15	USD	-	(0.001)
Retail Sales Control Group (AUG)	15-09-2017	12:30	USD	-	0.006
Retail Sales Ex Auto and Gas (AUG)	15-09-2017	12:30	USD	-	0.005
Retail Sales Less Autos (AUG)	15-09-2017	12:30	USD	-	0.005
U. of Mich. 1 Yr Inflation (SEP P)	15-09-2017	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (SEP P)	15-09-2017	14:00	USD	-	0.025
U. of Mich. Current Conditions (SEP P)	15-09-2017	14:00	USD	-	110.9
U. of Mich. Expectations (SEP P)	15-09-2017	14:00	USD	-	87.7
U. of Michigan Confidence (SEP P)	15-09-2017	14:00	USD	-	96.8

..... End of Report