



16 Jun.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,578	(0.4) %	3.7 %
BSE SENSEX	31,076	(0.3) %	3.9 %
CNX BANK	23,392	(0.5) %	8.6 %
CNX MIDCAP	17,984	0.3 %	3.8 %
CNX SMALLCAP	7,411	0.2 %	4.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,360	(0.1) %	7.4 %
S&P 500	2,432	(0.2) %	7.7 %
FTSE 100	7,419	(0.7) %	3.4 %
HANG SENG	25,565	(1.2) %	15.4 %
NIKKEI	19,832	(0.3) %	1.2 %
SHANGHAI COMPOSITE	3,132	0.1 %	(0.1) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.53	0.3 %	(4.3) %
EUR/USD	1.12	(0.6) %	5.2 %
GBP/USD	1.28	0.2 %	3.9 %
USD/JPY	111.11	1.0 %	(4.2) %
USD/AUD	1.32	(0.8) %	(3.8) %
USD/SGD	1.38	0.1 %	(3.3) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	(3.7) %	(14.5) %
Gold(INR/10g)	28,703	(0.4) %	3.2 %
Gold Comex(USD/oz)	1,267	(0.4) %	9.5 %
SILVER(INR/1Kg)	38,758	(0.1) %	(0.4) %
Aluminium(USD/MT)	1,887	0.5 %	10.8 %
Copper(USD/MT)	5,685	0.5 %	2.0 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.1	(0.1) %	(0.3) %

**Global Economy:** Homebuilder confidence in the US unexpectedly decreased in the month of June, according to a report released by the National Association of Home Builders on Thursday. The report said the NAHB /Wells Fargo Housing Market Index dropped to 67 in June from 69 in May. With a drop in manufacturing output offsetting increases in mining and utilities output, the Federal Reserve showed that US industrial production was unchanged in the month of May. The Fed said industrial production was flat in May after jumping by 1.1% in April. The report said manufacturing output fell by 0.4% in May following a 1.1% gain in the previous month.

**Global Equities:** The momentum continued to be choppy for US stocks. Following the mixed performance seen in the previous session, stocks moved mostly lower during trading on Thursday.

**Indian Economy:** India's exports rose by 8.32% to \$24 billion in May, though the trade deficit shot up to nearly 30-month high of \$13.84 billion, mainly due to increase in gold imports. Strong performance by petroleum, engineering, textiles and gems and jewellery sectors propelled the country's exports growth during the month. India's imports soared by 33% to USD 37.85 billion in May this year.

**Equity Markets:** Key benchmark indices registered modest losses weighed by weakness in global stocks as investors stepped back from risky assets following the Federal Reserve's policy decision. The Nifty hit three-week closing low. The Sensex hit almost three-week closing low. Domestic stocks drifted lower in early trade tracking negative Asian stocks. Stocks recovered in morning trade and hovered near the flat line. However, key indices once again resumed fall in mid-morning trade.

**Corporate News:** TCS announced that it has launched ignio for SAP ERP to help customers run their operations in SAP more effectively. ignio is a cognitive automation solution for enterprise IT. ignio has also achieved certified integration with SAP ERP. Infosys announced the appointment of Karmesh Vaswani as the Global Head - Retail, CPG & Logistics (RCL) and Nitesh Banga as the Global Head of Manufacturing, effective 15 July 2017. Karmesh Vaswani and Nitesh Banga are both career Infosysians who have held strategic portfolios across the organization for nearly a decade. ICICI Bank said that the committee of executive directors of the bank is scheduled to meet on 20 June 2017 to consider fund raising by way of issuance of senior unsecured long term bonds in the nature of debentures in single/multiple tranches on private placement basis.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	13.4	51.3	34.9
MF(INR cr)	(9.3)	344.5	489.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,283	26,083	29,659
F&O(INR cr)	844,802	454,994	516,589

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.6	10.4	11.6
NSE VIX	11.3	11.1	11.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,392	(0.5) %	8.6 %	Energy	11,779	(0.2) %	(0.3) %
IT	10,278	(0.8) %	(3.0) %	Pharma	9,696	1.3 %	(7.7) %
Metals	2,932	(0.4) %	(5.6) %	Finance	9,578	(0.4) %	8.5 %
Auto	10,839	(0.6) %	9.3 %	PSU	3,456	(0.6) %	(2.0) %
FMCG	25,753	0.0 %	8.9 %	Real Estate	270	2.2 %	23.3 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	644	6.9 %	(5.7) %	H P C L	519	(5.1) %	(0.0) %
A B B	1,506	3.3 %	13.9 %	I O C L	407	(3.2) %	6.8 %
Bajaj Fin.	1,405	3.3 %	18.9 %	B P C L	670	(3.1) %	5.0 %
Interglobe	1,186	2.7 %	13.7 %	Punjab Nat	147	(3.0) %	(1.7) %
DLF	192	2.3 %	30.7 %	Bharti Inf	375	(2.9) %	13.7 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
International Securities Transactions (Canadian dollar) (APR)	16-06-2017	12:30	CAD	-	-
EU 25 New Car Registrations (MAY)	16-06-2017	6:00	EUR	-	(0.066)
Euro-Zone Consumer Price Index - Core (YoY) (MAY F)	16-06-2017	9:00	EUR	-	0.009
Euro-Zone Consumer Price Index (MoM) (MAY)	16-06-2017	9:00	EUR	-	0.004
Euro-Zone Consumer Price Index (YoY) (MAY F)	16-06-2017	9:00	EUR	-	0.019
Euro-Zone Labor Costs (YoY) (1Q)	16-06-2017	9:00	EUR	-	0.016
BOJ Kuroda speaks at press conference after MPM	16-06-2017	6:30	JPY	-	-
Non Resident Bond Holdings (MAY)	16-06-2017	3:00	NZD	-	0.615
Baker Hughes U.S. Rig Count (JUN 16)	16-06-2017	17:00	USD	-	927
Building Permits (MAY)	16-06-2017	12:30	USD	-	-
Building Permits (MoM) (MAY)	16-06-2017	12:30	USD	-	(0.025)
Fed's Kaplan Speaks in Dallas	16-06-2017	16:45	USD	-	-
Housing Starts (MAY)	16-06-2017	12:30	USD	-	-
Housing Starts (MoM) (MAY)	16-06-2017	12:30	USD	-	(0.026)
Labor Market Conditions Index Change (MAY)	16-06-2017	14:00	USD	-	3.5
U. of Mich. 1 Yr Inflation (JUN P)	16-06-2017	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (JUN P)	16-06-2017	14:00	USD	-	0.024
U. of Mich. Current Conditions (JUN P)	16-06-2017	14:00	USD	-	111.7
U. of Mich. Expectations (JUN P)	16-06-2017	14:00	USD	-	87.7
U. of Michigan Confidence (JUN P)	16-06-2017	14:00	USD	-	97.1

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