



16 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,794	0.9 %	6.0 %
BSE SENSEX	31,449	0.8 %	5.1 %
CNX BANK	24,116	0.5 %	11.9 %
CNX MIDCAP	17,854	2.8 %	3.0 %
CNX SMALLCAP	7,369	2.8 %	4.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,999	0.0 %	10.6 %
S&P 500	2,465	(0.1) %	9.2 %
FTSE 100	7,384	0.4 %	2.9 %
HANG SENG	27,175	(0.3) %	22.7 %
NIKKEI	19,753	1.1 %	0.8 %
SHANGHAI COMPOSITE	3,251	0.4 %	3.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.12	(0.0) %	(4.9) %
EUR/USD	1.18	(0.3) %	11.1 %
GBP/USD	1.30	(0.4) %	5.4 %
USD/JPY	110.18	0.9 %	(5.0) %
USD/AUD	1.27	0.3 %	(7.1) %
USD/SGD	1.36	0.1 %	(4.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	0.5 %	(6.7) %
Gold(INR/10g)	28,901	(0.3) %	3.9 %
Gold Comex(USD/oz)	1,296	0.3 %	12.0 %
SILVER(INR/1Kg)	38,765	(0.8) %	(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: Retail sales in the US increased by more than anticipated in the month of July, according to a report released by the Commerce Department on Tuesday. The report said retail sales climbed by 0.6% in July after rising by a revised 0.3% in June. The bigger than expected increase in retail sales was partly due to a jump in sales by motor vehicle and parts dealers, which surged up by 1.2% in July after climbing by 0.9% in June. Excluding the jump in sales by motor vehicle and parts dealers, retail sales rose by 0.5% in July following a 0.1% gain in June. After reporting decreases in US homebuilder confidence in the two previous months, the National Association of Home Builders released a report showing a rebound in confidence in the month of August. The report said the NAHB/Wells Fargo Housing Market Index jumped to 68 in August from 64 in July.

Global Equities: US stocks eyed somewhat easing concerns about the situation with North Korea. Strong economic data also helped the sentiments.

Indian Economy: The all-India general CPI inflation rebounded 2.36% in July 2017 (new base 2012=100), compared with 1.46% in June 2017. The corresponding provisional inflation rate for rural area was 2.41% and urban area 2.17% in July 2017 as against 1.52% and 1.41% in June 2017. The core CPI inflation was nearly flat at 3.81% in July 2017 compared with 3.75% in June 2017. The cumulative CPI inflation was lower at 2.20% in April-July FY2018 compared with 5.67% in April-July FY2017. Among the CPI components, inflation of food and beverages rebounded to 0.43% in July 2017 from (-) 1.17% in June 2017 mainly contributing to the increase in CPI inflation.

Equity Markets: Domestic bourses logged modest gains on first trading day of the week boosted by positive global cues. The Sensex and the Nifty snapped their five-day declining trend as good buying in index linked counters supported the momentum.

Corporate News: The government has imposed a new penalty of USD 264 million (about Rs 1,700 crore) on Reliance Industries Ltd and its partners for producing less than the targeted natural gas from eastern offshore KG – D6 fields in 2015 – 16. The total penalty now, which is in the form of disallowing recovery of cost incurred for missing the target during six years beginning April 1, 2010, stands at USD 3.02 billion. India's merchandise export grew 3.9% to 22.54 billion in July, marking an annual increase in shipments for the 10th straight month, but slower than the 4.4% growth posted in the previous month. Domestic crude steel production witnessed a 4.6 % increase at 8.45 million tonnes (MT) in July, according to official data. This is against the total output of 8.082 MT of crude steel in the same month a year ago.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(285.1)	(46.3)	19.4
MF(INR cr)	(38.4)	554.3	480.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,028	31,296	30,442
F&O(INR cr)	368,608	630,261	557,265

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.5	11.6	11.2
NSE VIX	14.4	12.8	11.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,116	0.5 %	11.9 %	Energy	12,860	1.6 %	8.8 %
IT	10,587	(0.6) %	(0.0) %	Pharma	8,758	2.8 %	(16.6) %
Metals	3,327	3.4 %	7.1 %	Finance	9,909	0.7 %	12.3 %
Auto	10,600	1.4 %	6.8 %	PSU	3,286	(0.2) %	(6.8) %
FMCG	24,908	0.6 %	5.4 %	Real Estate	270	5.8 %	23.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
DLF	182	16.8 %	23.7 %	Bosch	22,138	(2.1) %	(2.2) %
Sun TV Net	751	6.2 %	(5.6) %	Bharti Air	409	(1.4) %	19.5 %
UPL	858	5.8 %	16.7 %	HCL Techno	860	(1.4) %	(0.7) %
Cipla	570	5.3 %	(3.8) %	B P C L	478	(1.2) %	12.4 %
Sun Pharma	472	4.8 %	(31.9) %	TCS	2,469	(1.1) %	2.4 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Wage Cost Index (QoQ) (2Q)	16-08-2017	01:30	AUD	-	0.005
Wage Cost Index (YoY) (2Q)	16-08-2017	01:30	AUD	-	0.019
Westpac Leading Index (MoM) (JUL)	16-08-2017	00:30	AUD	-	(0.001)
International Securities Transactions (Canadian dollar) (JUN)	16-08-2017	12:30	CAD	-	-
Euro-Zone Gross Domestic Product s.a. (QoQ) (2Q P)	16-08-2017	09:00	EUR	-	0.006
Euro-Zone Gross Domestic Product s.a. (YoY) (2Q P)	16-08-2017	09:00	EUR	-	0.021
Italian Gross Domestic Product s.a. and w.d.a. (QoQ) (2Q P)	16-08-2017	08:00	EUR	-	0.004
Italian Gross Domestic Product s.a. and w.d.a. (YoY) (2Q P)	16-08-2017	08:00	EUR	-	0.012
Average Weekly Earnings (3M/YoY) (JUN)	16-08-2017	08:30	GBP	-	0.018
Claimant Count Rate (JUL)	16-08-2017	08:30	GBP	-	0.023
Employment Change (3M/3M) (JUN)	16-08-2017	08:30	GBP	-	-
ILO Unemployment Rate (3M) (JUN)	16-08-2017	08:30	GBP	-	0.045
Jobless Claims Change (JUL)	16-08-2017	08:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (JUN)	16-08-2017	08:30	GBP	-	0.02
Adjusted Merchandise Trade Balance (Yen) (JUL)	16-08-2017	23:50	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	16-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	16-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	16-08-2017	01:10	JPY	-	-
Foreign Buying Japan Bonds (Yen) (AUG 11)	16-08-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (AUG 11)	16-08-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (AUG 11)	16-08-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 11)	16-08-2017	23:50	JPY	-	-
Merchandise Trade Balance Total (Yen) (JUL)	16-08-2017	23:50	JPY	-	-
Merchandise Trade Exports (YoY) (JUL)	16-08-2017	23:50	JPY	-	0.097
Merchandise Trade Imports (YoY) (JUL)	16-08-2017	23:50	JPY	-	0.155
Non Resident Bond Holdings (JUL)	16-08-2017	03:00	NZD	-	0.615
Producer Prices- Inputs (QoQ) (2Q)	16-08-2017	22:45	NZD	-	0.008
Producer Prices- Outputs (QoQ) (2Q)	16-08-2017	22:45	NZD	-	0.014
Building Permits (JUL)	16-08-2017	12:30	USD	-	-



Building Permits (MoM) (JUL)	16-08-2017	12:30	USD	-	0.074
DOE Cushing OK Crude Inventory (AUG 11)	16-08-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 11)	16-08-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (AUG 11)	16-08-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (AUG 11)	16-08-2017	14:30	USD	-	-
FOMC Meeting Minutes (JUL 26)	16-08-2017	18:00	USD	-	-
Housing Starts (JUL)	16-08-2017	12:30	USD	-	-
Housing Starts (MoM) (JUL)	16-08-2017	12:30	USD	-	0.083
MBA Mortgage Applications (AUG 11)	16-08-2017	11:00	USD	-	0.03

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