



17 Aug.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,914	0.2 %	7.3 %
BSE SENSEX	31,771	1.0 %	6.4 %
CNX BANK	24,352	(0.4) %	13.0 %
CNX MIDCAP	18,188	0.5 %	4.9 %
CNX SMALLCAP	7,544	0.7 %	6.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,025	0.1 %	10.8 %
S&P 500	2,468	0.1 %	9.3 %
FTSE 100	7,433	0.7 %	3.6 %
HANG SENG	27,409	0.9 %	23.7 %
NIKKEI	19,729	(0.1) %	0.7 %
SHANGHAI COMPOSITE	3,246	(0.2) %	3.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.15	0.0 %	(4.8) %
EUR/USD	1.18	(0.3) %	11.2 %
GBP/USD	1.29	(0.8) %	4.9 %
USD/JPY	109.68	0.5 %	(5.4) %
USD/AUD	1.26	(0.6) %	(7.9) %
USD/SGD	1.36	0.1 %	(4.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	(2.6) %	(9.1) %
Gold(INR/10g)	28,726	(0.6) %	3.3 %
Gold Comex(USD/oz)	1,279	(1.3) %	10.5 %
SILVER(INR/1Kg)	38,144	(1.6) %	(2.0) %
Aluminium(USD/MT)	2,056	0.8 %	20.8 %
Copper(USD/MT)	6,382	0.4 %	14.5 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	0.1 %	(0.2) %

**Global Economy:** The Federal Reserve remains on track to unwind its \$4.5 trillion balance sheet at an "upcoming" meeting, according to the minutes of the central bank's July monetary policy meeting. Policy makers also expect to raise their benchmark lending rate by a quarter percentage point one more time this year despite ongoing concerns about stubbornly tame inflation. However, some members want to be patient on raising interest rates, however, as they lowered their forecast for underlying inflation. The euro area economy expanded as initially estimated in the second quarter with better contribution from individual economies. Gross domestic product grew 0.6% quarter-on-quarter, slightly faster than the 0.5% increase seen in the first three months of the year, the latest flash estimate from Eurostat showed.

**Global Equities:** US stocks rose Wednesday, with the Dow Jones Industrial Average up for a fourth day despite political worries after the disintegration of the president's business advisory council.

**Indian Economy:** The Union Cabinet chaired by the Prime Minister Narendra Modi has given its approval for raising Extra Budgetary Resources (EBR) of upto Rs. 9020 crore as per the requirement during 2017-18 by NABARD through issuance of Bonds for ensuring lending rate of 6% per annum (pa) in respect of borrowings for implementation of Accelerated Irrigation Benefits Programme (AIBP) works of 99 ongoing prioritized irrigation projects along with their command area development (CAD) works under PMKSY.

**Equity Markets:** Strong gains in metals and FMCG shares pushed the key benchmark indices higher for second day in a row. The Sensex and the Nifty hit one-week closing high. The gains were led by ITC, HDFC and HDFC Bank. Bank stocks gained. Metal shares logged sharp gains as copper prices rose in global commodity markets. Many FMCG shares rose as well.

**Corporate News:** Metals and mining counters would be in focus today as global metal prices are soaring to fresh highs. Copper is at a two and half year high while Zinc has spurt to 10 year highs. The operator of military canteens has slapped an over Rs 250 crore fine on United Spirits, accusing the nation's largest alcohol maker of violating a pricing agreement, media reports quoted. Larsen and Toubro has entered into definitive agreement for the divestment of its entire stake in L&T Cutting Tools, a wholly-owned subsidiary, with IMC International Metalworking Companies B.V, a company owned by Berkshire Hathaway Inc.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(238.0)	(65.5)	16.6
MF(INR cr)	(38.4)	554.3	480.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,524	31,225	30,443
F&O(INR cr)	849,970	650,235	560,413

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.0	11.6	11.2
NSE VIX	14.2	13.0	11.5

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,438	1.3 %	13.4 %	Energy	12,831	(0.2) %	8.6 %
IT	10,660	0.7 %	0.6 %	Pharma	8,859	1.2 %	(15.7) %
Metals	3,384	1.7 %	9.0 %	Finance	10,046	1.4 %	13.8 %
Auto	10,779	1.7 %	8.6 %	PSU	3,355	2.1 %	(4.8) %
FMCG	25,535	2.5 %	8.0 %	Real Estate	272	0.9 %	24.1 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Torrent Ph	1,324	8.5 %	(12.0) %	Havells In	465	(2.4) %	(0.9) %
Petronet L	230	5.6 %	10.9 %	Rural Elec	164	(1.6) %	(8.7) %
Container	1,230	5.2 %	21.7 %	Glenmark P	622	(1.3) %	(27.5) %
Tech Mahin	420	4.4 %	(7.3) %	Asian Pain	1,141	(1.1) %	4.7 %
Cummins In	921	3.9 %	(4.2) %	NTPC	170	(1.0) %	3.3 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (JUL)	17-08-2017	01:30	AUD	-	-
Full Time Employment Change (JUL)	17-08-2017	01:30	AUD	-	-
Part Time Employment Change (JUL)	17-08-2017	01:30	AUD	-	-
Participation Rate (JUL)	17-08-2017	01:30	AUD	-	0.65
RBA Foreign Exchange Transaction (Australian dollar) (JUL)	17-08-2017	01:30	AUD	-	-
RBA FX Transactions Government (JUL)	17-08-2017	01:30	AUD	-	-
RBA FX Transactions Other (JUL)	17-08-2017	01:30	AUD	-	-
RBA's Ellis Gives Speech in Canberra	17-08-2017	08:20	AUD	-	-
Unemployment Rate (JUL)	17-08-2017	01:30	AUD	-	0.056
Manufacturing Shipments (MoM) (JUN)	17-08-2017	12:30	CAD	-	0.011
ECB account of the monetary policy meeting	17-08-2017	11:30	EUR	-	-
Euro-Zone Consumer Price Index - Core (YoY) (JUL F)	17-08-2017	09:00	EUR	-	0.012
Euro-Zone Consumer Price Index (MoM) (JUL)	17-08-2017	09:00	EUR	-	0
Euro-Zone Consumer Price Index (YoY) (JUL F)	17-08-2017	09:00	EUR	-	0.013
Euro-Zone Trade Balance (euros) (JUN)	17-08-2017	09:00	EUR	-	-
Euro-Zone Trade Balance s.a. (euros) (JUN)	17-08-2017	09:00	EUR	-	-
Retail Sales (MoM) (JUL)	17-08-2017	08:30	GBP	-	0.009
Retail Sales (YoY) (JUL)	17-08-2017	08:30	GBP	-	0.03
Retail Sales Inc Auto Fuel (MoM) (JUL)	17-08-2017	08:30	GBP	-	0.006
Retail Sales Inc Auto Fuel (YoY) (JUL)	17-08-2017	08:30	GBP	-	0.029
ANZ Consumer Confidence (MoM) (AUG)	17-08-2017	01:00	NZD	-	(0.019)
ANZ Consumer Confidence Index (AUG)	17-08-2017	01:00	NZD	-	125.4
Capacity Utilization (JUL)	17-08-2017	13:15	USD	-	0.766
Continuing Claims (AUG 05)	17-08-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (AUG 11)	17-08-2017	14:30	USD	-	28
EIA Working Natural Gas Implied Flow (AUG 11)	17-08-2017	14:30	USD	-	28
Fed's Kaplan Speaks in Lubbock, Texas	17-08-2017	17:00	USD	-	-
Industrial Production (JUL)	17-08-2017	13:15	USD	-	0.004
Initial Jobless Claims (AUG 10)	17-08-2017	13:30	USD	-	-



Leading Indicators (JUL)	17-08-2017	14:00	USD	-	0.006
Manufacturing (SIC) Production (JUL)	17-08-2017	13:15	USD	-	0.002
Philadelphia Fed Business Outlook (AUG)	17-08-2017	12:30	USD	-	19.5

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