



17 Oct.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,231	0.6 %	10.7 %
BSE SENSEX	32,634	0.6 %	9.1 %
CNX BANK	24,703	0.1 %	14.6 %
CNX MIDCAP	18,779	0.3 %	8.3 %
CNX SMALLCAP	8,010	0.3 %	13.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,957	0.4 %	15.5 %
S&P 500	2,558	0.2 %	13.3 %
FTSE 100	7,527	(0.1) %	4.9 %
HANG SENG	28,693	0.8 %	29.5 %
NIKKEI	21,256	0.5 %	8.5 %
SHANGHAI COMPOSITE	3,378	(0.4) %	7.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.72	(0.6) %	(4.0) %
EUR/USD	1.18	(0.6) %	11.1 %
GBP/USD	1.32	(0.2) %	7.7 %
USD/JPY	112.05	0.0 %	(3.4) %
USD/AUD	1.28	(0.0) %	(6.8) %
USD/SGD	1.35	0.1 %	(5.3) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	1.7 %	(1.7) %
Gold(INR/10g)	29,868	0.7 %	7.4 %
Gold Comex(USD/oz)	1,306	0.6 %	12.9 %
SILVER(INR/1Kg)	40,021	0.6 %	2.8 %
Aluminium(USD/MT)	2,140	1.1 %	25.7 %
Copper(USD/MT)	6,858	0.7 %	23.0 %

**FIXED INCOME**

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

**Global Economy:** The Euro area trade surplus increased in August on exports, data from Eurostat showed Monday. The trade surplus rose to a seasonally adjusted EUR 21.6 billion in August from EUR 17.9 billion in July. Exports increased 2.5% from previous month, while imports gained only 0.4%. Germany's wholesale price inflation rose to a five-month high in September, data from Destatis revealed. Wholesale prices advanced 3.4% year-on-year in September, following a 3.2% rise in August. This was the fastest increase since April. Month-on-month, wholesale price inflation doubled to 0.6% from 0.3% in August. Monthly inflation was the fastest since January. Japan's industrial production increased by a seasonally adjusted 2% monthly in August instead of a 2.1% increase reported earlier, latest figures from the Ministry of Economy, Trade and Industry showed on Monday. On a yearly basis, industrial production growth accelerated to 5.3% in August from 4.7% in July. Data also showed that capacity utilization rate edged up 3.3% month-over-month in August, in contrast to a 1.8% decline in the preceding month.

**Global Equities:** Sentiments remained steady in Europe and US as investors eyed the political developments in Spain as well as the Brexit negotiations in Briton

**Indian Economy:** The official Wholesale Price Index for 'All Commodities' (Base: 2011-12=100) for the month of September, 2017 declined by 0.4% to 114.3 (provisional) from 114.8 (provisional) for the previous month. The annual rate of inflation, based on monthly WPI, stood at 2.60% (provisional) for the month of September, 2017 (over September,2016) as compared to 3.24% (provisional) for the previous month and 1.36% during the corresponding month of the previous year. Build up inflation rate in the financial year so far was 0.97% compared to a build up rate of 3.44% in the corresponding period of the previous year.

**Equity Markets:** Key benchmark indices closed the session with modest gains amid positive sentiment in other Asian bourses and record closing on the Wall Street last week. The Sensex and the Nifty both attained record closing high levels. Key indices gained for the third straight day. Both the Sensex and the Nifty had hit record high in early trade as positive trade data and encouraging comments from the IMF chief on the outlook for Indian economy cheered investors. Also, market sentiment was buoyant in a truncated trading week ahead of Diwali.

**Corporate News:** The National Investment and Infrastructure Fund (NIIF) of India on Monday said it has signed an investment agreement worth \$1 billion with Abu Dhabi Investment Authority (ADIA). The government has set up NIIF with the aim to attract investments from both domestic and international sources for infrastructure development in commercially viable projects. Market debutant Godrej Agrovet ended lower than its listing price yesterday, but soared around 29% higher than the issue price at Rs 592. The diversified agro-business company started off first trade at Rs 615.60 on the National Stock Exchange, a robust premium of 33.82% over its issue price of Rs 460 per share. Jain Irrigation announced its pipe division has received an order worth Rs 178.4 crore in Gujarat.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(239.5)	(75.2)	(16.3)
MF(INR cr)	8.8	575.8	615.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,363	30,768	30,692
F&O(INR cr)	683,571	609,599	592,144

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.6	9.7	11.1
NSE VIX	11.3	11.5	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,703	0.1 %	14.6 %	Energy	13,711	0.2 %	16.0 %
IT	10,962	0.3 %	3.5 %	Pharma	9,693	1.5 %	(7.7) %
Metals	3,855	1.9 %	24.1 %	Finance	10,161	(0.0) %	15.1 %
Auto	11,217	1.3 %	13.1 %	PSU	3,039	(0.2) %	(13.8) %
FMCG	25,608	0.7 %	8.3 %	Real Estate	286	1.1 %	30.4 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	83	5.3 %	(2.4) %	Bajaj Fin.	1,886	(3.4) %	59.6 %
Bharti Air	453	5.2 %	32.6 %	Colgate-Pa	1,063	(2.6) %	5.6 %
Bharti Inf	472	4.8 %	43.1 %	ICICI Pru	395	(2.5) %	2.5 %
Vedanta	335	4.3 %	22.9 %	IndusInd B	1,716	(2.0) %	22.3 %
M & M	1,369	3.3 %	6.4 %	Axis Bank	520	(1.7) %	3.9 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
New Motor Vehicle Sales (MoM) (SEP)	17-10-2017	0:30	AUD	-	0
New Motor Vehicle Sales (YoY) (SEP)	17-10-2017	0:30	AUD	-	0.017
RBA Oct. Rate Meeting Minutes	17-10-2017	0:30	AUD	-	-
RBA's Ellis Participates in a Panel	17-10-2017	0:30	AUD	-	-
Westpac Leading Index (MoM) (SEP)	17-10-2017	23:30	AUD	-	(0.0008)
BoC's Governor Wilkins Speaks at Sibos Conference	17-10-2017	19:30	CAD	-	-
ECB's Constancio and Bank of Portugal's Carlos Speak in Lisbon	17-10-2017	8:00	EUR	-	-
ECB's Constancio Speaks at Conference in Lisbon	17-10-2017	8:00	EUR	-	-
EU 25 New Car Registrations (SEP)	17-10-2017	6:00	EUR	-	0.056
Euro-Zone Consumer Price Index - Core (YoY) (SEP F)	17-10-2017	9:00	EUR	-	0.011
Euro-Zone Consumer Price Index (MoM) (SEP)	17-10-2017	9:00	EUR	-	0.003
Euro-Zone Consumer Price Index (YoY) (SEP F)	17-10-2017	9:00	EUR	-	0.015
Euro-Zone ZEW Survey (Economic Sentiment) (OCT)	17-10-2017	9:00	EUR	-	31.7
German ZEW Survey (Current Situation) (OCT)	17-10-2017	9:00	EUR	-	87.9
German ZEW Survey (Economic Sentiment) (OCT)	17-10-2017	9:00	EUR	-	17
BOE Governor Carney Testifies to Lawmakers	17-10-2017	10:15	GBP	-	-
BOE's Brazier Speaks in Lisbon	17-10-2017	13:30	GBP	-	-
BOE's Carney, Ramsden, and Tenreyro Appears Before Treasury	17-10-2017	8:15	GBP	-	-
Consumer Price Index (MoM) (SEP)	17-10-2017	8:30	GBP	-	0.006
Consumer Price Index (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.029
Core Consumer Price Index (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.027
CPIH (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.027
House Price Index (YoY) (AUG)	17-10-2017	8:30	GBP	-	0.051
Producer Price Index Input n.s.a. (MoM) (SEP)	17-10-2017	8:30	GBP	-	0.016
Producer Price Index Input n.s.a. (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.076
Producer Price Index Output Core n.s.a. (MoM) (SEP)	17-10-2017	8:30	GBP	-	0.002
Producer Price Index Output Core n.s.a. (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.025
Producer Price Index Output n.s.a. (MoM) (SEP)	17-10-2017	8:30	GBP	-	0.004
Producer Price Index Output n.s.a. (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.024



Retail Price Index (MoM) (SEP)	17-10-2017	8:30	GBP	-	0.007
Retail Price Index (SEP)	17-10-2017	8:30	GBP	-	274.7
Retail Price Index (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.039
Retail Price Index Ex Mort Int.Payments (YoY) (SEP)	17-10-2017	8:30	GBP	-	0.041
Non Resident Bond Holdings (SEP)	17-10-2017	2:00	NZD	-	0.612
Capacity Utilization (SEP)	17-10-2017	13:15	USD	-	0.761
Export Price Index (MoM) (SEP)	17-10-2017	12:30	USD	-	0.006
Export Price Index (YoY) (SEP)	17-10-2017	12:30	USD	-	0.023
Fed's Harker Speaks on Equitable Transit	17-10-2017	17:00	USD	-	-
Import Price Index (MoM) (SEP)	17-10-2017	12:30	USD	-	0.006
Import Price Index (YoY) (SEP)	17-10-2017	12:30	USD	-	0.021
Import Price Index ex Petroleum (MoM) (SEP)	17-10-2017	12:30	USD	-	0.003
Industrial Production (SEP)	17-10-2017	13:15	USD	-	(0.009)
Manufacturing (SIC) Production (SEP)	17-10-2017	13:15	USD	-	(0.003)
NAHB Housing Market Index (OCT)	17-10-2017	14:00	USD	-	64
Net Long-term TIC Flows (AUG)	17-10-2017	20:00	USD	-	-
Total Net TIC Flows (AUG)	17-10-2017	20:00	USD	-	-
U.S. to Sell 4-Week Bills	17-10-2017	15:30	USD	-	-

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