



17 Nov.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,215	0.0 %	10.6 %
BSE SENSEX	33,107	1.1 %	10.7 %
CNX BANK	25,447	0.0 %	18.1 %
CNX MIDCAP	19,441	0.0 %	12.2 %
CNX SMALLCAP	8,354	0.0 %	18.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,458	0.8 %	18.0 %
S&P 500	2,586	0.8 %	14.5 %
FTSE 100	7,387	0.2 %	2.9 %
HANG SENG	29,019	0.6 %	31.0 %
NIKKEI	22,351	1.5 %	14.1 %
SHANGHAI COMPOSITE	3,399	(0.1) %	8.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.32	(0.2) %	(3.1) %
EUR/USD	1.18	0.2 %	11.4 %
GBP/USD	1.32	0.8 %	7.6 %
USD/JPY	112.58	(0.4) %	(2.9) %
USD/AUD	1.32	(0.3) %	(3.8) %
USD/SGD	1.35	(0.4) %	(5.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(0.7) %	5.7 %
Gold(INR/10g)	29,426	(0.4) %	5.8 %
Gold Comex(USD/oz)	1,278	(0.3) %	10.5 %
SILVER(INR/1Kg)	39,455	(0.1) %	1.4 %
Aluminium(USD/MT)	2,082	(0.1) %	22.3 %
Copper(USD/MT)	6,716	(1.6) %	20.5 %

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	(0.0) %	(0.1) %

Global Economy: Eurozone inflation eased to 1.4 percent in October from 1.5 percent in September, final data from Eurostat showed Thursday. The rate came in line with the flash estimate released on October 31. On a monthly basis, the HICP gained 0.1 percent in October. Core inflation that excludes energy, food, alcohol and tobacco, moderated to 0.9 percent, as previously estimated, from 1.1 percent in the preceding month. UK retail sales increased 0.3 percent in October from September, but slightly faster than the expected 0.2 percent, the Office for National Statistics reported Thursday. Excluding auto fuel, sales volume grew only 0.1 percent. On a yearly basis, overall retail sales volume fell 0.3 percent on month, reversing a revised 1.3 percent rise in September.

Global Equities: US stocks showed a strong move back to the upside during trading on Thursday, after moving lower over the two previous sessions. With the upward move on the day, the Nasdaq reached a new record closing high.

Indian Economy: India's economic slowdown has bottomed out and now it should start moving upwards after recovering from the "temporary blip" seen during the recent structural changes, Finance Minister Arun Jaitley said on Thursday. Addressing investors at a conference on 'India: Structural Reforms and Growth Path Ahead', Mr. Jaitley talked about the "massive" economic reforms undertaken by India. "I think the bottoming out of the economy is complete and now it should start moving upwards. The global economy is also moving up," said Mr. Jaitley. "How do I see the economy moving? Our basic parameters are quite stable. And we grew between 7-8% over the last three years," he said.

Equity Markets: Market registered strong gains on renewed buying after previous three sessions of losses. The barometer index, the S&P BSE Sensex, rose 346.38 points or 1.06% to settle at 33,106.82. The Nifty 50 index rose 96.70 points or 0.96% to settle at 10,214.75. The Sensex closed above the 33,000 level. IT stocks advanced. Index heavyweight Reliance Industries gained.

Corporate News: Wipro announced the launch of industry-specific solutions on SAP Leonardo. The first set of solutions will focus on the utilities industry, while the next will cover the consumer and manufacturing industries. As part of the partnership, Wipro will develop industry-specific analytics "apps" on its insights-as-a-service solution, Data Discovery Platform, leveraging SAP Leonardo analytics, Big Data and data intelligence capabilities. The announcement was made after market hours yesterday, 16 November 2017. Bharti Airtel announced the launch of two new Android powered 4G smartphones at the price of a feature phone in partnership with Karbonn Mobiles. The launch is part of Airtel's 'Mera Pehla Smartphone' initiative, which is aimed at enabling every Indian to buy a 4G smartphone and get on to the digital superhighway. The 'AI Indian' 4G smartphone will be available at an effective price of Rs 1799 (compared to MRP of Rs 4390) and the 'A41 Power' comes at an effective price of Rs 1,849 (compared to MRP of Rs 4,290). Both 4G smartphones come bundled with a monthly pack of Rs 169 from Airtel, which offers generous data and calling benefits. The announcement was made after market hours yesterday, 16 November 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	280.1	197.2	6.6
MF(INR cr)	2,325.9	478.2	596.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,847	40,821	31,925
F&O(INR cr)	1,026,308	698,672	607,161

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.1	10.6	11.0
NSE VIX	13.5	13.2	11.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,447	0.9 %	18.1 %	Energy	13,877	1.5 %	17.4 %
IT	11,317	1.7 %	6.8 %	Pharma	9,083	0.6 %	(13.5) %
Metals	3,698	1.0 %	19.1 %	Finance	10,345	0.9 %	17.2 %
Auto	11,156	0.5 %	12.5 %	PSU	4,030	3.2 %	14.3 %
FMCG	25,544	1.1 %	8.1 %	Real Estate	302	1.3 %	37.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Punjab Nat	190	4.9 %	26.4 %	Adani Port	397	(2.4) %	16.1 %
Marico	304	4.9 %	2.6 %	Siemens	1,169	(1.5) %	(10.2) %
United Spi	3,117	4.6 %	52.3 %	Coal India	268	(1.5) %	(9.0) %
Bank of Ba	183	4.3 %	6.0 %	Havells In	498	(1.4) %	6.3 %
Infosys	988	3.8 %	(2.0) %	Shree Ceme	17,932	(1.2) %	4.4 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
New Motor Vehicle Sales (MoM) (OCT)	17-11-2017	00:30	AUD	-	(0.005)
New Motor Vehicle Sales (YoY) (OCT)	17-11-2017	00:30	AUD	-	(0.008)
Consumer Price Index (OCT)	17-11-2017	13:30	CAD	-	130.8
Consumer Price Index (YoY) (OCT)	17-11-2017	13:30	CAD	-	0.016
Consumer Price Index Core (YoY) (OCT)	17-11-2017	13:30	CAD	-	0.015
Consumer Price Index n.s.a. (MoM) (OCT)	17-11-2017	13:30	CAD	-	0.002
CPI Core- Median (YoY) (OCT)	17-11-2017	13:30	CAD	-	0.018
CPI Core- Trim (YoY) (OCT)	17-11-2017	13:30	CAD	-	0.015
Bundesbank's Weidmann Speaks at European Banking Congress	17-11-2017	13:00	EUR	-	-
ECB's Draghi Speaks in Frankfurt	17-11-2017	08:30	EUR	-	-
Euro-Zone Construction Output s.a. (MoM) (SEP)	17-11-2017	10:00	EUR	-	(0.002)
Euro-Zone Construction Output w.d.a. (YoY) (SEP)	17-11-2017	10:00	EUR	-	0.016
Euro-Zone Current Account n.s.a. (euros) (SEP)	17-11-2017	09:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (SEP)	17-11-2017	09:00	EUR	-	-
BOJ Outright Bond Purchase 1~3 Years	17-11-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	17-11-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	17-11-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	17-11-2017	01:10	JPY	-	-
Baker Hughes U.S. Rig Count (NOV 17)	17-11-2017	18:00	USD	-	907
Building Permits (MoM) (OCT)	17-11-2017	13:30	USD	-	(0.045)
Building Permits (OCT)	17-11-2017	13:30	USD	-	-
Fed's Williams Speaks with Reporters	17-11-2017	22:30	USD	-	-
Housing Starts (MoM) (OCT)	17-11-2017	13:30	USD	-	(0.047)
Housing Starts (OCT)	17-11-2017	13:30	USD	-	-
Kansas City Fed Manf. Activity (NOV)	17-11-2017	16:00	USD	-	23

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