



18 Oct.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,234	0.0 %	10.8 %
BSE SENSEX	32,609	(0.1) %	9.0 %
CNX BANK	24,646	(0.2) %	14.4 %
CNX MIDCAP	18,888	0.6 %	9.0 %
CNX SMALLCAP	8,067	0.7 %	14.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,997	0.2 %	15.7 %
S&P 500	2,559	0.1 %	13.4 %
FTSE 100	7,516	(0.1) %	4.7 %
HANG SENG	28,697	0.0 %	29.6 %
NIKKEI	21,336	0.4 %	8.9 %
SHANGHAI COMPOSITE	3,372	(0.2) %	7.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.72	(0.3) %	(4.0) %
EUR/USD	1.18	(0.4) %	11.1 %
GBP/USD	1.32	(0.3) %	7.7 %
USD/JPY	112.05	0.2 %	(3.4) %
USD/AUD	1.28	0.6 %	(6.8) %
USD/SGD	1.35	0.4 %	(5.3) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	0.8 %	(0.9) %
Gold(INR/10g)	29,671	(0.7) %	6.7 %
Gold Comex(USD/oz)	1,295	(0.8) %	11.9 %
SILVER(INR/1Kg)	39,432	(1.5) %	1.3 %
Aluminium(USD/MT)	2,144	0.2 %	26.0 %
Copper(USD/MT)	7,063	3.0 %	26.7 %

**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:** After reporting a notable decrease in US industrial production in the previous month, the Federal Reserve released a report on Tuesday showing production rebounded by slightly more than expected in the month of September. The report said production rose by 0.3% in September after sliding by 0.7% in August. Germany's economic confidence continued to improve in October, survey data from the Mannheim-based Centre for European Economic Research/ZEW showed Tuesday. The ZEW Indicator of Economic Sentiment rose to 17.6 in October from 17.0 in the previous month. However, the indicator still remained below the long-term average of 23.8. The indicator for current situation slipped by 0.9 points to 87.0 points in October. Eurozone inflation held steady in September, as initially estimated, final data from Eurostat showed. Inflation came in at 1.5% in September, the same rate as seen in August. Inflation continues to stay well below the European Central Bank's target of 'below, but close to 2%'. Core inflation that excludes energy, food, alcohol and tobacco, eased marginally to 1.1% from 1.2% in the previous month. UK house price inflation edged up in August to the strongest level in eight months, figures from the Office for National Statistics showed Tuesday. The house price index climbed 5% year-over-year in August, faster than the 4.5% rise in July, which was revised down from a 5.1% increase reported earlier.

**Global Equities:** European stocks witnessed a mixed trend. British Prime Minister Theresa May reportedly met with leading EU officials in Brussels on yesterday, 16 October 2017. Both May and the European Commission President Jean-Claude Juncker called for the pace of Brexit negotiations to be accelerated.

**Indian Economy:** The Vice President of India, M. Venkaiah Naidu has said that reformative measures like the introduction of GST will improve the economy. He further stated, the world is changing at a rapid pace aided by technological and digital revolutions. Any nation unable to keep pace with the changes will become a laggard. India is at the threshold of becoming one of the major economic powers and the private sector can play a huge role in accelerating the growth and development of the country.

**Equity Markets:** Local indices closed the range-bound trading session near the flat line. Both the Sensex and the Nifty hit record highs in intraday trade. The Nifty settled at a record high level. Media reports suggested that North Korea's deputy UN ambassador warned that the situation on the Korean Peninsula has reached the touch-and-go point and a nuclear war may break out any moment.

**Corporate News:** IT major Wipro said that the company's net profit rose 5.5% to Rs 2192 crore on 1.1% increase in IT services revenue to Rs 13169 crore in Q2 September 2017 over Q1 June 2017. Wipro said that it expects revenues from its IT services business to be in the range of \$2014 million to \$2054 million in Q3 December 2017. Rising competitive intensity in the US markets is poised to create a challenging operating landscape for large exporters leading to contraction in overall exports of pharmaceutical formulations to the regulated markets in the near term and weak-to-moderate pace growth over the medium-to-long term, says India Rating and Research (Ind-Ra). Crude oil prices stayed near three week highs, hitting above \$52 per barrel for the WTI futures and could keep local Oil Marketing Companies in focus today.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	26.9	(65.0)	(16.0)
MF(INR cr)	284.0	546.6	613.1

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,177	30,805	30,696
F&O(INR cr)	640,635	612,420	592,503

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.9	9.7	11.1
NSE VIX	11.6	11.5	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,646	(0.2) %	14.4 %	Energy	13,728	0.1 %	16.1 %
IT	10,943	(0.2) %	3.3 %	Pharma	9,741	0.5 %	(7.3) %
Metals	3,868	0.3 %	24.6 %	Finance	10,134	(0.3) %	14.8 %
Auto	11,222	0.0 %	13.1 %	PSU	3,038	(0.0) %	(13.8) %
FMCG	25,621	0.1 %	8.4 %	Real Estate	288	0.9 %	31.6 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	90	8.3 %	5.8 %	Zee Entert	495	(3.8) %	(6.4) %
Cipla	632	4.2 %	6.7 %	Colgate-Pa	1,042	(2.0) %	3.5 %
Petronet L	261	4.1 %	26.1 %	Oracle Fin	3,543	(1.6) %	(6.4) %
Power Fin.	128	4.0 %	(13.2) %	Axis Bank	513	(1.4) %	2.5 %
Torrent Ph	1,330	3.4 %	(11.6) %	Container	1,342	(1.3) %	32.7 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Manufacturing Shipments (MoM) (AUG)	18-10-2017	12:30	CAD	-	(0.026)
ECB President Draghi speaks in Frankfurt	18-10-2017	8:10	EUR	-	-
ECB's Coeure is chairing a panel in Frankfurt	18-10-2017	14:15	EUR	-	-
ECB's Praet is chairing a panel in Frankfurt	18-10-2017	11:45	EUR	-	-
Euro-Zone Construction Output s.a. (MoM) (AUG)	18-10-2017	9:00	EUR	-	0.002
Euro-Zone Construction Output w.d.a. (YoY) (AUG)	18-10-2017	9:00	EUR	-	0.034
Average Weekly Earnings (3M/YoY) (AUG)	18-10-2017	8:30	GBP	-	0.021
Claimant Count Rate (SEP)	18-10-2017	8:30	GBP	-	0.023
Employment Change (3M/3M) (AUG)	18-10-2017	8:30	GBP	-	-
ILO Unemployment Rate (3M) (AUG)	18-10-2017	8:30	GBP	-	0.043
Jobless Claims Change (SEP)	18-10-2017	8:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (AUG)	18-10-2017	8:30	GBP	-	0.021
Adjusted Merchandise Trade Balance (Yen) (SEP)	18-10-2017	23:50	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	18-10-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	18-10-2017	1:10	JPY	-	-
BOJ Sakurai makes a speech	18-10-2017	1:30	JPY	-	-
Foreign Buying Japan Bonds (Yen) (OCT 13)	18-10-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (OCT 13)	18-10-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (OCT 13)	18-10-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (OCT 13)	18-10-2017	23:50	JPY	-	-
Merchandise Trade Balance Total (Yen) (SEP)	18-10-2017	23:50	JPY	-	-
Merchandise Trade Exports (YoY) (SEP)	18-10-2017	23:50	JPY	-	0.181
Merchandise Trade Imports (YoY) (SEP)	18-10-2017	23:50	JPY	-	0.152
Building Permits (MoM) (SEP)	18-10-2017	12:30	USD	-	0.057
Building Permits (SEP)	18-10-2017	12:30	USD	-	-
DOE Cushing OK Crude Inventory (OCT 13)	18-10-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (OCT 13)	18-10-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (OCT 13)	18-10-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (OCT 13)	18-10-2017	14:30	USD	-	-



Fed's Dudley and Kaplan Discuss Economic Development	18-10-2017	12:00	USD	-	-
Housing Starts (MoM) (SEP)	18-10-2017	12:30	USD	-	(0.008)
Housing Starts (SEP)	18-10-2017	12:30	USD	-	-
MBA Mortgage Applications (OCT 13)	18-10-2017	11:00	USD	-	(0.021)
U.S. Federal Reserve Releases Beige Book	18-10-2017	18:00	USD	-	-

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