



19 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,827	(0.9) %	6.4 %
BSE SENSEX	31,711	(1.1) %	6.0 %
CNX BANK	24,022	0.0 %	11.5 %
CNX MIDCAP	18,217	(0.5) %	5.1 %
CNX SMALLCAP	7,580	(0.6) %	7.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,575	(0.3) %	8.5 %
S&P 500	2,461	0.1 %	9.0 %
FTSE 100	7,390	(0.2) %	3.0 %
HANG SENG	26,525	0.2 %	19.7 %
NIKKEI	20,000	(0.6) %	2.1 %
SHANGHAI COMPOSITE	3,188	0.4 %	1.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.33	(0.2) %	(4.6) %
EUR/USD	1.15	0.7 %	8.9 %
GBP/USD	1.30	(0.5) %	6.0 %
USD/JPY	112.02	(0.5) %	(3.4) %
USD/AUD	1.26	(1.2) %	(7.8) %
USD/SGD	1.37	(0.4) %	(4.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	(1.1) %	(12.1) %
Gold(INR/10g)	28,188	0.5 %	1.4 %
Gold Comex(USD/oz)	1,237	0.7 %	6.9 %
SILVER(INR/1Kg)	37,271	0.5 %	(4.2) %
Aluminium(USD/MT)	1,901	(0.2) %	11.7 %
Copper(USD/MT)	5,966	1.8 %	7.0 %

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) %	(0.2) %

Global Economy: Homebuilder confidence in the US unexpectedly declined in the month of July, according to a report released by the National Association of Home Builders on Tuesday. The report said the NAHB/Wells Fargo Housing Market Index dropped to 64 in July from a revised 66 in June. With fuel prices seeing another steep decline, the Labor Department released a report on Tuesday showing that US import prices fell in line with economist estimates in the month of June. The Labor Department said import prices dropped by 0.2% in June after edging down by a revised 0.1% in May.

Global Equities: US markets continued to turn in a lackluster performance during trading on Tuesday. The major averages finished the session on opposite sides of the unchanged line.

Indian Economy: Union Minister of State for Chemicals and Fertilizers, Shipping, Road Transport & Highways, Mansukh L. Mandaviya, said that the availability of fertilizers far exceeds their requirement in the country. He also noted that the supply of Urea has been more than the requirement in the last 3 years, including the current year.

Equity Markets: Key benchmark indices dropped sharply led by slide in index heavyweights ITC and Reliance Industries (RIL). The Sensex settled below the psychologically important 32,000 mark after seeing a gap-down opening. Both the Sensex and the Nifty hit record high on intraday as well as closing basis on Monday.

Corporate News: Hindustan Unilever reported a 9.3% rise in profit after tax at Rs 1,283 crore for the June quarter. The FMCG major had reported Rs 1,174 crore profit for the corresponding quarter last year. Revenue for the quarter came in at Rs 9,094 crore, up 4.98% YoY over Rs 8,662 crore reported in the same quarter last year. However, Volume growth remained flat, the company said in a BSE filing. CRISIL's consolidated net profit rose 9.33% to Rs 67.25 crore on 7.26% growth in total income to Rs 415.79 crore in Q2 June 2017 over Q2 June 2016. MOIL said that in terms of Cabinet Committee of Economic Affairs (CCEA) decision dated 16 January 2015, it has been decided by Government of India to offer upto 6.65 lakh equity shares of face value of Rs 10 each of MOIL to the eligible employees of MOIL at a discounted price of Rs. 346.75 (this price is at 5% discount to the cut off price of Rs 365 discovered in the offer for sale of shares of MOIL carried out by Government of India on 24 & 25 January 2017). The minimum and maximum number of equity shares which can be applied for by eligible employees is 10 and 576 equity shares, respectively.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	58.4	(0.5)	25.0
MF(INR cr)	163.4	460.8	483.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,631	32,429	29,960
F&O(INR cr)	575,904	512,000	533,114

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	9.8	10.8	11.3
NSE VIX	11.5	11.1	11.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,022	0.0 %	11.5 %	Energy	12,373	(1.3) %	4.7 %
IT	10,493	0.5 %	(0.9) %	Pharma	10,024	0.3 %	(4.6) %
Metals	3,165	(0.2) %	1.9 %	Finance	9,774	(0.1) %	10.7 %
Auto	10,954	0.2 %	10.4 %	PSU	3,519	(0.3) %	(0.2) %
FMCG	25,548	(6.7) %	8.1 %	Real Estate	278	(1.0) %	26.7 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Eicher Mot	28,599	1.9 %	12.0 %	ITC	285	(12.5) %	1.1 %
Asian Pain	1,147	1.9 %	5.2 %	Shriram Tr	965	(4.4) %	(12.6) %
S A I L	63	1.5 %	(0.6) %	Cadila Hea	524	(2.6) %	18.4 %
B H E L	143	1.5 %	(14.2) %	Ashok Leyl	105	(2.6) %	25.4 %
HCL Techno	881	1.5 %	1.7 %	H P C L	368	(2.6) %	6.5 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA's Heath Speech in Sydney	19-07-2017	5:30	AUD	-	-
Westpac Leading Index (MoM) (JUN)	19-07-2017	0:30	AUD	-	0
Manufacturing Shipments (MoM) (MAY)	19-07-2017	12:30	CAD	-	0.011
Euro-Zone Construction Output s.a. (MoM) (MAY)	19-07-2017	9:00	EUR	-	0.003
Euro-Zone Construction Output w.d.a. (YoY) (MAY)	19-07-2017	9:00	EUR	-	0.032
Adjusted Merchandise Trade Balance (Yen) (JUN)	19-07-2017	23:50	JPY	-	-
Machine Tool Orders (YoY) (JUN F)	19-07-2017	6:00	JPY	-	0.311
Merchandise Trade Balance Total (Yen) (JUN)	19-07-2017	23:50	JPY	-	-
Merchandise Trade Exports (YoY) (JUN)	19-07-2017	23:50	JPY	-	0.149
Merchandise Trade Imports (YoY) (JUN)	19-07-2017	23:50	JPY	-	0.178
Building Permits (JUN)	19-07-2017	12:30	USD	-	-
Building Permits (MoM) (JUN)	19-07-2017	12:30	USD	-	(0.049)
DOE Cushing OK Crude Inventory (JUL 14)	19-07-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUL 14)	19-07-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUL 14)	19-07-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUL 14)	19-07-2017	14:30	USD	-	-
Housing Starts (JUN)	19-07-2017	12:30	USD	-	-
Housing Starts (MoM) (JUN)	19-07-2017	12:30	USD	-	(0.055)
MBA Mortgage Applications (JUL 14)	19-07-2017	11:00	USD	-	(0.074)

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