



19 Sep.2017

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,153	0.7 %	9.9 %
BSE SENSEX	32,424	0.5 %	8.4 %
CNX BANK	25,047	0.8 %	16.2 %
CNX MIDCAP	19,089	0.7 %	10.1 %
CNX SMALLCAP	8,032	1.2 %	13.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,331	0.3 %	12.3 %
S&P 500	2,504	0.2 %	10.9 %
FTSE 100	7,253	0.5 %	1.1 %
HANG SENG	28,160	1.3 %	27.1 %
NIKKEI	19,910	0.5 %	1.6 %
SHANGHAI COMPOSITE	3,363	0.3 %	7.2 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.14	0.0 %	(4.9) %
EUR/USD	1.20	0.5 %	12.9 %
GBP/USD	1.35	0.9 %	9.9 %
USD/JPY	111.59	1.3 %	(3.8) %
USD/AUD	1.26	0.4 %	(8.2) %
USD/SGD	1.35	(0.0) %	(5.8) %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	0.0 %	(4.7) %
Gold(INR/10g)	29,723	(0.7) %	6.9 %
Gold Comex(USD/oz)	1,324	(0.8) %	14.4 %
SILVER(INR/1Kg)	40,118	(0.6) %	3.1 %
Aluminium(USD/MT)	2,068	0.1 %	21.5 %
Copper(USD/MT)	6,457	0.6 %	15.8 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	0.0 %	(0.3) %

**Global Economy:** Reflecting concerns about the recent hurricanes, the National Association of Home Builders released a report on Monday showing a bigger than expected drop in US homebuilder confidence in the month of September. The report said the NAHB/Wells Fargo Housing Market Index dropped to 64 in September from a downwardly revised 67 in August. Eurozone inflation climbed to a four-month high in August, as initially estimated, final data from Eurostat showed Monday. Consumer prices advanced 1.5% year-on-year in August, faster than the 1.3% increase seen in July.

**Global Equities:** US stocks soared to fresh record highs Monday amid hopes the worst of the North Korea crisis is over. Supportive corporate earnings and expectations the U.S Federal Reserve will keep interest rates low following the recent Hurricanes also offered some impetus to buying.

**Indian Economy:** The number of Foreign Tourist Arrivals (FTAs) in August, 2017 was 7.24 lakh as compared to FTAs of 6.52 lakh in August, 2016 and 5.99 lakh in August, 2015. The growth rate in FTAs in August, 2017 over August, 2016 is 11.0% compared to 8.8% in August, 2016 over August, 2015. FTAs during the period January- August 2017 were 63.98 lakh with a growth of 15.2% over same period of previous year, as compared to the FTAs of 55.54 lakh with a growth of 9.5% in January- August 2016 over January- August 2015.

**Equity Markets:** Market registered modest gains in a broadly firm session of trade. Telecom stocks gained. Index heavyweights Hindustan Unilever and L&T advanced. The Sensex attained its highest closing levels in more than 1-1/2 months. The Nifty hit a record closing high. Strong global cues lifted investors' spirit in opening trade. Later, market sentiment remained buoyant till mid-afternoon trade helped by positive European stocks. However, indices slightly pared intraday gains in late trade.

**Corporate News:** Infosys announced that the CMA CGM Group, a world leader in container shipping and Infosys, announced a strategic seven-year partnership which will simplify and transform CMA CGM's IT application and improve customer service experience. Passengers carried by domestic airlines during January-August, 2017 were 754.11 lakhs as against 644.68 lakhs during the corresponding period of previous year thereby registering a growth of 16.97%. The Ministry of Coal noted that as on 16/09/2017, the total coal despatch of Coal India Limited was 1.49 MT. The total Coal despatch on 16/09/2017 to power sector was about 1.16MT. A total of 213.5 railway rakes of coal were despatched to different consumers out of which 196 railway rakes were despatched to power sector alone. The despatch to power sector through rail is around 20% more as compared to the same period of September 2016.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	184.9	(33.2)	(1.5)
MF(INR cr)	844.5	568.7	574.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,066	29,134	30,176
F&O(INR cr)	404,222	528,957	574,334

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.2	10.9	11.3
NSE VIX	11.4	12.3	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,047	0.8 %	16.2 %	Energy	13,377	0.2 %	13.2 %
IT	10,650	0.5 %	0.5 %	Pharma	9,340	0.0 %	(11.1) %
Metals	3,690	0.7 %	18.8 %	Finance	10,293	0.5 %	16.6 %
Auto	11,105	1.2 %	11.9 %	PSU	3,271	(0.2) %	(7.2) %
FMCG	25,578	0.3 %	8.2 %	Real Estate	289	0.7 %	31.8 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharti Inf	389	4.0 %	18.1 %	Divi's Lab	834	(4.0) %	32.9 %
Bajaj Auto	3,137	3.7 %	12.7 %	JSW Steel	263	(1.9) %	39.0 %
Idea Cellu	83	3.6 %	(3.0) %	Piramal En	2,843	(1.4) %	46.8 %
Sun TV Net	850	3.1 %	6.8 %	SAIL	62	(1.1) %	(2.3) %
Indiabulls	1,301	2.8 %	30.6 %	ONGC	165	(0.9) %	(11.1) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
House Price Index (QoQ) (2Q)	19-09-2017	1:30	AUD	-	0.022
House Price Index (YoY) (2Q)	19-09-2017	1:30	AUD	-	0.102
RBA Sept. Rate Meeting Minutes	19-09-2017	1:30	AUD	-	-
Manufacturing Shipments (MoM) (JUL)	19-09-2017	12:30	CAD	-	(0.018)
Euro-Zone Construction Output s.a. (MoM) (JUL)	19-09-2017	9:00	EUR	-	(0.005)
Euro-Zone Construction Output w.d.a. (YoY) (JUL)	19-09-2017	9:00	EUR	-	0.034
Euro-Zone Current Account n.s.a. (euros) (JUL)	19-09-2017	8:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (JUL)	19-09-2017	8:00	EUR	-	-
Euro-Zone ZEW Survey (Economic Sentiment) (SEP)	19-09-2017	9:00	EUR	-	29.3
German ZEW Survey (Current Situation) (SEP)	19-09-2017	9:00	EUR	-	86.7
German ZEW Survey (Economic Sentiment) (SEP)	19-09-2017	9:00	EUR	-	10
Adjusted Merchandise Trade Balance (Yen) (AUG)	19-09-2017	23:50	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	19-09-2017	1:10	JPY	-	-
Merchandise Trade Balance Total (Yen) (AUG)	19-09-2017	23:50	JPY	-	-
Merchandise Trade Exports (YoY) (AUG)	19-09-2017	23:50	JPY	-	0.134
Merchandise Trade Imports (YoY) (AUG)	19-09-2017	23:50	JPY	-	0.163
Current Account Balance (2Q)	19-09-2017	22:45	NZD	-	-
Current Account Deficit-GDP Ratio (2Q)	19-09-2017	22:45	NZD	-	(0.031)
Building Permits (AUG)	19-09-2017	12:30	USD	-	-
Building Permits (MoM) (AUG)	19-09-2017	12:30	USD	-	(0.041)
Current Account Balance (2Q)	19-09-2017	12:30	USD	-	-
Export Price Index (MoM) (AUG)	19-09-2017	12:30	USD	-	0.004
Export Price Index (YoY) (AUG)	19-09-2017	12:30	USD	-	0.008
Housing Starts (AUG)	19-09-2017	12:30	USD	-	-
Housing Starts (MoM) (AUG)	19-09-2017	12:30	USD	-	(0.048)
Import Price Index (MoM) (AUG)	19-09-2017	12:30	USD	-	0.001
Import Price Index (YoY) (AUG)	19-09-2017	12:30	USD	-	0.015
Import Price Index ex Petroleum (MoM) (AUG)	19-09-2017	12:30	USD	-	0



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