



20 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,900	0.7 %	7.2 %
BSE SENSEX	31,955	0.8 %	6.8 %
CNX BANK	24,153	0.5 %	12.1 %
CNX MIDCAP	18,344	0.7 %	5.8 %
CNX SMALLCAP	7,690	1.4 %	8.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,641	0.3 %	8.8 %
S&P 500	2,474	0.5 %	9.6 %
FTSE 100	7,431	0.6 %	3.5 %
HANG SENG	26,672	0.6 %	20.4 %
NIKKEI	20,021	0.1 %	2.2 %
SHANGHAI COMPOSITE	3,231	1.4 %	3.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.28	(0.1) %	(4.7) %
EUR/USD	1.15	(0.2) %	8.6 %
GBP/USD	1.30	(0.5) %	5.9 %
USD/JPY	111.84	(0.4) %	(3.6) %
USD/AUD	1.25	(1.4) %	(8.4) %
USD/SGD	1.37	0.0 %	(4.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	0.8 %	(11.3) %
Gold(INR/10g)	28,198	0.0 %	1.4 %
Gold Comex(USD/oz)	1,241	0.3 %	7.2 %
SILVER(INR/1Kg)	37,339	0.2 %	(4.1) %
Aluminium(USD/MT)	1,887	(0.7) %	10.9 %
Copper(USD/MT)	5,941	(0.4) %	6.6 %

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: After reporting an unexpected decline in new residential construction in the US in the previous month, the Commerce Department released a report on Wednesday showing housing starts rebounded by more than expected in the month of June. The report said housing starts surged up by 8.3% to an annual rate of 1.215 million in June from the revised May estimate of 1.122 million. The bigger than expected increase in housing starts was partly due to a jump in multi-family starts, which spiked by 13.3 percent to a rate of 366,000 in June from 323,000 in May. Single-family starts also saw a notable increase during the month, climbing by 6.3 percent to a rate of 849,000 in June from 799,000 in May. The Commerce Department said building permits also jumped by 7.4 percent to a rate of 1.254 million in June from 1.168 million in May.

Global Equities: US stocks moved up on a resurgence in buying. With the upward move on the day, all three major averages reached new record closing highs.

Indian Economy: Foreign Exchange Earnings (FEEs) through tourism during the month of June 2017 were Rs.13,088 crore as compared to Rs. 10,677 crore in June 2016 and Rs.9,564 crore in June 2015. The growth rate in FEEs in rupee terms in June 2017 over June 2016 was 22.6% compared to growth of 11.6% in June 2016 over June 2015. FEEs during the period January- June 2017 were Rs. 87,096 crore with a growth of 19.7%, as compared to the FEE of Rs.72,749 crore with a growth of 13.6% in January- June 2016 over January- June, 2015.

Equity Markets: Key benchmark indices registered strong gains on positive global cues. Firmness prevailed on the bourses as the key benchmark indices retained positive zone throughout the day. Today's market upmove was triggered by gains in ITC, TCS and Reliance Industries. Bank stocks rose. Telecom shares rose after report suggested that Bharti Airtel, Idea Cellular and Vodafone pushed for doubling of mobile call termination charge to recover cost. Metal shares were in demand.

Corporate News: Tata Consultancy Services announced that its customer, Axis Securities has launched voice based trading as part of TCS BaNCS Digital and is among the early adopters of this technology to offer such a capability to its customers. As a result of this new offering, trade volumes are expected to grow by 10-15% from the mobile app and the enhanced voice based trading. Wipro, Bajaj Auto, Kotak Mahindra Bank and RBL Bank will announce April-June 2017 results on today, 20 July 2017. Dwarikesh Sugar Industries said that ICRA has vide it's letter dated 19 July 2017 upgraded the rating from [ICRA]A- (pronounced as ICRA A minus) to [ICRA]A+ (pronounced as ICRA A Plus) with stable outlook for long term loans/ fund based / non fund based facilities of Rs 599.99 crore. Karnataka Bank said that the bank is targeting a farm credit of Rs 6800 crore during 2017-18.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	58.4	4.4	25.4
MF(INR cr)	(186.9)	372.9	468.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,652	32,523	30,010
F&O(INR cr)	544,813	514,524	533,273

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.9	10.7	11.3
NSE VIX	11.3	11.2	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,153	0.5 %	12.1 %	Energy	12,489	0.9 %	5.7 %
IT	10,584	0.9 %	(0.1) %	Pharma	10,235	2.1 %	(2.6) %
Metals	3,226	1.9 %	3.9 %	Finance	9,825	0.5 %	11.3 %
Auto	11,012	0.5 %	11.0 %	PSU	3,549	0.9 %	0.7 %
FMCG	25,916	1.4 %	9.6 %	Real Estate	281	1.4 %	28.4 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	95	9.1 %	11.8 %	UltraTech	4,206	(2.9) %	4.4 %
Aurobindo	766	4.3 %	12.1 %	Pidilite I	798	(2.1) %	13.5 %
H P C L	384	4.2 %	11.0 %	Interglobe	1,257	(1.7) %	20.5 %
Cadila Hea	545	3.9 %	23.0 %	ACC	1,735	(1.4) %	18.6 %
Cummins In	966	3.3 %	0.5 %	NHPC Ltd	31	(1.0) %	(3.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (JUN)	20-07-2017	1:30	AUD	-	-
Full Time Employment Change (JUN)	20-07-2017	1:30	AUD	-	-
NAB Business Confidence (2Q)	20-07-2017	1:30	AUD	-	6
Part Time Employment Change (JUN)	20-07-2017	1:30	AUD	-	-
Participation Rate (JUN)	20-07-2017	1:30	AUD	-	0.649
RBA Foreign Exchange Transaction (Australian dollar) (JUN)	20-07-2017	1:30	AUD	-	-
RBA FX Transactions Government (JUN)	20-07-2017	1:30	AUD	-	-
RBA FX Transactions Other (JUN)	20-07-2017	1:30	AUD	-	-
RBA's DeBelle Speech in Adelaide	20-07-2017	2:40	AUD	-	-
Unemployment Rate (JUN)	20-07-2017	1:30	AUD	-	0.055
Exports (MoM) (JUN)	20-07-2017	6:00	CHF	-	0.029
Imports (MoM) (JUN)	20-07-2017	6:00	CHF	-	0.02
Trade Balance (Swiss franc) (JUN)	20-07-2017	6:00	CHF	-	-
ECB Asset Purchase Target (JUL)	20-07-2017	11:45	EUR	-	-
ECB Deposit Facility Rate (JUL 20)	20-07-2017	11:45	EUR	-	(0.004)
ECB Marginal Lending Facility (JUL 20)	20-07-2017	11:45	EUR	-	0.0025
Euro Area First Quarter Government Debt	20-07-2017	9:00	EUR	-	-
Euro Area First Quarter Government Deficit	20-07-2017	9:00	EUR	-	-
European Central Bank Rate Decision (JUL 20)	20-07-2017	11:45	EUR	-	0
Euro-Zone Consumer Confidence (JUL A)	20-07-2017	14:00	EUR	-	(1.3)
Euro-Zone Current Account n.s.a. (euros) (MAY)	20-07-2017	8:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (MAY)	20-07-2017	8:00	EUR	-	-
German Producer Prices (MoM) (JUN)	20-07-2017	6:00	EUR	-	(0.002)
German Producer Prices (YoY) (JUN)	20-07-2017	6:00	EUR	-	0.028
Retail Sales (MoM) (JUN)	20-07-2017	8:30	GBP	-	(0.016)
Retail Sales (YoY) (JUN)	20-07-2017	8:30	GBP	-	0.006
Retail Sales Inc Auto Fuel (MoM) (JUN)	20-07-2017	8:30	GBP	-	(0.012)
Retail Sales Inc Auto Fuel (YoY) (JUN)	20-07-2017	8:30	GBP	-	0.009
All Inclusive Activities Index (MoM) (MAY)	20-07-2017	4:00	IND	-	0.001



BOJ Kuroda speaks at press conference after MPM	20-07-2017	6:30	JPY	-	-
Convenience Store Sales (YoY) (JUN)	20-07-2017	7:00	JPY	-	0.01
Foreign Buying Japan Bonds (Yen) (JUL 14)	20-07-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (JUL 14)	20-07-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUL 14)	20-07-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUL 14)	20-07-2017	23:50	JPY	-	-
Net Migration SA (JUN)	20-07-2017	22:45	NZD	-	5900
Continuing Claims (JUL 08)	20-07-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (JUL 14)	20-07-2017	14:30	USD	-	57
EIA Working Natural Gas Implied Flow (JUL 14)	20-07-2017	14:30	USD	-	57
Initial Jobless Claims (JUL 15)	20-07-2017	12:30	USD	-	-
Leading Indicators (JUN)	20-07-2017	14:00	USD	-	0.003
Philadelphia Fed. (JUL)	20-07-2017	12:30	USD	-	27.6
U.S. to Sell USD13 Bln 10-Year TIPS	20-07-2017	17:00	USD	-	-

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