



21 Jun.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,618	(0.4) %	4.1 %
BSE SENSEX	31,298	(0.0) %	4.4 %
CNX BANK	23,633	(0.3) %	9.7 %
CNX MIDCAP	18,036	0.1 %	4.1 %
CNX SMALLCAP	7,444	0.0 %	5.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,467	(0.3) %	8.0 %
S&P 500	2,437	(0.7) %	7.9 %
FTSE 100	7,473	(0.7) %	4.1 %
HANG SENG	25,843	(0.3) %	16.7 %
NIKKEI	20,230	0.8 %	3.2 %
SHANGHAI COMPOSITE	3,140	(0.1) %	0.1 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.50	0.1 %	(4.3) %
EUR/USD	1.11	(0.1) %	5.0 %
GBP/USD	1.26	(0.8) %	2.7 %
USD/JPY	111.34	(0.3) %	(4.0) %
USD/AUD	1.32	0.2 %	(3.5) %
USD/SGD	1.39	0.2 %	(2.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	(2.4) %	(17.4) %
Gold(INR/10g)	28,531	(0.1) %	2.6 %
Gold Comex(USD/oz)	1,247	0.0 %	7.7 %
SILVER(INR/1Kg)	38,252	(0.2) %	(1.7) %
Aluminium(USD/MT)	1,889	1.5 %	11.0 %
Copper(USD/MT)	5,674	(0.2) %	1.8 %

**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:** Global economic growth is expected to rise from 2.5% last year to 2.9% in 2017 and 3.1% in 2018 -- its highest rate since 2010 -- rating agency Fitch Ratings said in a latest update. Faster growth this year reflects a synchronized improvement across both advanced and emerging market economies, Fitch said in its Global Economic Outlook report. The recovery in commodity prices from early 2016 has fuelled a rebound in emerging market demand, it added further. The German economy is set to sustain its robust growth momentum this year with foreign trade emerging again as the key driver, but policymakers must prepare the economy for the uncertainties from the USA and Brexit, the Federation of German Industries, or BDI, said Tuesday. Real economic output will grow by 1.5%, BDI President Dieter Kempf stated. The biggest euro area economy grew 1.9% in 2016.

**Global Equities:** A steep drop in crude oil prices pulled US stocks notably lower. With the drop on the day, the Dow and the S&P 500 pulled back off yesterday's record closing highs.

**Indian Economy:** IT spending by banking and securities firms in India will grow 8.6% in 2017 to reach \$8.9 billion, according to Gartner, Inc. IT services will grow the fastest at 13.8% in 2017 followed by software at 13.4%. Firms in the banking and securities industry are investing more in enterprise resource planning (ERP)/ supply chain management (SCM)/ customer relationship management (CRM) to upgrade their existing infrastructure.

**Equity Markets:** Amid a divergent trend among various index constituents, the key benchmark indices finished a shade lower in a quiet session of trade. Exports have been exhibiting positive growth for the last eight months. In continuation with growth indicated by exports since September 2016, exports during May 2017 have shown growth of 8.32% in dollar terms valued at US\$ 24014.62 million as compared to US\$ 22170.62 million during May, 2016.

**Corporate News:** Crude oil linked counters could be in focus. WTI oil prices fell to fresh seven-month lows today, with investors remaining dubious about how effective the production cuts spearheaded by Saudi Arabia and Russia have been and will be. Thomas Cook (India) said that Travel Corporation (India) Limited, wholly owned subsidiary of the company, intimated that it has successfully subscribed to 49% of equity share capital of TCI-Go Vacation India Private Limited, a joint venture Company with DER Touristik Group. Tech Mahindra said that one of the company's step down subsidiary, LCC Middle East FZ LLC agreed to sell its 100% shareholding in LCC Pakistan (Pvt) Ltd. to Talkpool AG, Switzerland. ICICI Bank announced that the Committee of Executive Directors of the Bank at its meeting held on 20 June 2017 has approved the proposal for fund raising by way of issuance of senior unsecured long term bonds in the nature of debentures in single/multiple tranches on private placement basis. The announcement was made after market hours yesterday, 20 June 2017.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(25.7)	21.9	28.5
MF(INR cr)	214.2	406.1	489.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	25,101	26,209	29,493
F&O(INR cr)	334,665	432,527	507,342

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.4	10.4	11.6
NSE VIX	10.7	11.0	11.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,698	(0.2) %	10.0 %	Energy	11,933	0.2 %	1.0 %
IT	10,290	0.9 %	(2.9) %	Pharma	9,482	(0.1) %	(9.7) %
Metals	2,989	0.2 %	(3.8) %	Finance	9,684	(0.4) %	9.7 %
Auto	10,901	0.1 %	9.9 %	PSU	3,484	(0.1) %	(1.2) %
FMCG	26,056	(0.3) %	10.2 %	Real Estate	271	0.2 %	23.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Power	82	5.2 %	(8.0) %	Punjab Nat	144	(2.3) %	(4.0) %
Container	1,186	4.7 %	17.3 %	Motherson	480	(2.1) %	27.8 %
Tata Motor	467	3.3 %	(0.6) %	Power Grid	208	(1.9) %	6.2 %
Idea Cellu	82	3.1 %	(3.5) %	Eicher Mot	27,917	(1.9) %	9.3 %
Godrej Con	1,937	3.0 %	14.2 %	Lupin	1,113	(1.7) %	(22.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (May)	21-06-2017	1:00	AUD	-	0.001
Westpac Leading Index (MoM) (May)	21-06-2017	0:30	AUD	-	(0.001)
Money Supply M3 (YoY) (May)	21-06-2017	7:00	CHF	-	0.03
BOE's Haldane Speaks in Yorkshire	21-06-2017	11:00	GBP	-	-
Central Government NCR (May)	21-06-2017	8:30	GBP	-	-
PSNB ex Banking Groups (May)	21-06-2017	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (May)	21-06-2017	8:30	GBP	-	-
Public Sector Net Borrowing (Pounds) (May)	21-06-2017	8:30	GBP	-	-
All Industry Activity Index (MoM) (Apr)	21-06-2017	4:30	JPY	-	(0.006)
BOJ Kuroda speaks in Tokyo	21-06-2017	6:36	JPY	-	-
Foreign Buying Japan Bonds (Yen) (16 Jun)	21-06-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (16 Jun)	21-06-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (16 Jun)	21-06-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (16 Jun)	21-06-2017	23:50	JPY	-	-
Machine Tool Orders (YoY) (May F)	21-06-2017	6:00	JPY	-	0.244
Net Migration SA (May)	21-06-2017	22:45	NZD	-	5780
Reserve Bank of New Zealand Rate Decision (22 Jun)	21-06-2017	21:00	NZD	-	0.0175
DOE Cushing OK Crude Inventory (16 Jun)	21-06-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (16 Jun)	21-06-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (16 Jun)	21-06-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (16 Jun)	21-06-2017	14:30	USD	-	-
Existing Home Sales (May)	21-06-2017	14:00	USD	-	-
Existing Home Sales (MoM) (May)	21-06-2017	14:00	USD	-	(0.023)
MBA Mortgage Applications (16 Jun)	21-06-2017	11:00	USD	-	0.028

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