



21 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,141	(0.1) %	9.8 %
BSE SENSEX	32,401	(0.0) %	8.3 %
CNX BANK	24,965	(0.3) %	15.9 %
CNX MIDCAP	19,055	(0.2) %	9.9 %
CNX SMALLCAP	8,013	(0.5) %	13.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,413	0.2 %	12.7 %
S&P 500	2,508	0.1 %	11.1 %
FTSE 100	7,272	(0.1) %	1.3 %
HANG SENG	28,128	0.3 %	27.0 %
NIKKEI	20,310	0.1 %	3.7 %
SHANGHAI COMPOSITE	3,366	0.3 %	7.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.27	0.2 %	(4.7) %
EUR/USD	1.19	(0.8) %	12.0 %
GBP/USD	1.35	(0.3) %	9.6 %
USD/JPY	112.52	0.8 %	(3.0) %
USD/AUD	1.25	(0.6) %	(8.7) %
USD/SGD	1.35	0.3 %	(5.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(0.9) %	(5.4) %
Gold(INR/10g)	29,753	0.3 %	7.0 %
Gold Comex(USD/oz)	1,316	0.2 %	13.7 %
SILVER(INR/1Kg)	39,738	1.0 %	2.1 %
Aluminium(USD/MT)	2,108	2.0 %	23.8 %
Copper(USD/MT)	6,492	0.1 %	16.5 %

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 %	(0.2) %

Global Economy: In a key announcement, the US Federal Reserve announced that, for the first time in nine years, it would start reducing the size of its \$4.5 trillion asset portfolio starting in October. The Fed kept interest rates unchanged, as widely expected, but said it would start to shrink its balance sheet by \$10 billion a month. The Fed also noted that a December rate increase remains on the table. Information received since the Federal Open Market Committee met in July indicates that the labor market has continued to strengthen and that economic activity has been rising moderately so far this year. Job gains have remained solid in recent months, and the unemployment rate has stayed low. Household spending has been expanding at a moderate rate, and growth in business fixed investment has picked up in recent quarters. On a 12-month basis, overall inflation and the measure excluding food and energy prices have declined this year and are running below 2%.

Global Equities: US stocks eased from record highs as some selling hit the stocks following the Fed statement. US Treasuries jumped along with US dollar and commodities eased.

Indian Economy: Union Agriculture and Farmers Welfare Minister, Radha Mohan Singh said that considering its importance, the Government has accorded top priority to the agriculture sector and Finance Ministry announced Rs.62,376 crore fund allocation for the sector in 2017-18. The government's aim is to increase the productivity and ensure farmers can get the remunerative price of their produce. The Government is also ensuring that along with special focus on dairy/animal husbandry/fishery, the agriculture education, research, and expansion system is further extended.

Equity Markets: Key benchmark indices settled near the flat line in a range-bound trading session.. Market sentiment was lackluster amid lack of substantial cues to perk up investors' spirits. Investors are also cautious ahead of the outcome of Federal Reserve monetary policy meeting later in the day. Overseas, European stocks edged higher while Asian stocks were mixed.

Corporate News: Domestic car sales will soar 9% this year and 7% in 2018, supported by the impact of India's new goods and services tax (GST) as well as new model launches, ratings agency Moody's said, according to media reports. The National Pharmaceutical Pricing Authority (NPPA) on Wednesday said it has fixed and revised the ceiling prices of 39 drug formulations. This indicates that some drugs used in the treatment of cancer, hepatitis B, tuberculosis, measles and malaria are expected to get cheaper from hereon. Larsen & Toubro's hydrocarbon division has bagged an order worth Rs 1,700 crore to build a pipeline for Kuwait Oil Company, the company said in a release Wednesday.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(245.9)	(48.0)	(3.8)
MF(INR cr)	730.0	549.6	572.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,212	30,012	30,263
F&O(INR cr)	431,171	511,378	571,455

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.2	10.8	11.2
NSE VIX	11.6	12.2	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,965	(0.3) %	15.9 %	Energy	13,410	(0.0) %	13.5 %
IT	10,651	(0.0) %	0.6 %	Pharma	9,320	0.3 %	(11.3) %
Metals	3,661	(0.1) %	17.9 %	Finance	10,247	(0.2) %	16.1 %
Auto	11,103	(0.6) %	11.9 %	PSU	3,277	1.0 %	(7.0) %
FMCG	25,699	0.2 %	8.7 %	Real Estate	290	(0.5) %	32.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Divi's Lab	943	9.2 %	50.3 %	Idea Cellu	80	(3.7) %	(5.8) %
Dr Reddy's	2,315	3.3 %	(15.7) %	ICICI Pru	412	(2.8) %	6.9 %
Bank of Ba	148	2.6 %	(14.0) %	B P C L	494	(2.5) %	16.1 %
Siemens	1,433	1.7 %	10.0 %	Hero Motoc	3,856	(2.2) %	20.4 %
Tata Steel	688	1.7 %	41.5 %	Tata Motor	415	(2.1) %	(11.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Foreign Exchange Transaction (Australian dollar) (AUG)	21-09-2017	1:30	AUD	-	-
RBA FX Transactions Government (AUG)	21-09-2017	1:30	AUD	-	-
RBA FX Transactions Other (AUG)	21-09-2017	1:30	AUD	-	-
Wholesale Sales (MoM) (JUL)	21-09-2017	12:30	CAD	-	(0.005)
Exports (MoM) (AUG)	21-09-2017	6:00	CHF	-	(0.017)
Imports (MoM) (AUG)	21-09-2017	6:00	CHF	-	(0.01)
Money Supply M3 (YoY) (AUG)	21-09-2017	7:00	CHF	-	0.04
SECO September 2017 Economic Forecasts	21-09-2017	5:45	CHF	-	-
Trade Balance (Swiss franc) (AUG)	21-09-2017	6:00	CHF	-	-
ECB Executive Board member Praet chairs a panel in Frankfurt	21-09-2017	9:30	EUR	-	-
ECB President Mario Draghi speaks in Frankfurt	21-09-2017	13:30	EUR	-	-
ECB Publishes Economic Bulletin	21-09-2017	8:00	EUR	-	-
Euro-Zone Consumer Confidence (SEP A)	21-09-2017	14:00	EUR	-	(1.5)
BBA Loans for House Purchase (AUG)	21-09-2017	8:30	GBP	-	41587
Central Government NCR (AUG)	21-09-2017	8:30	GBP	-	-
PSNB ex Banking Groups (AUG)	21-09-2017	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (AUG)	21-09-2017	8:30	GBP	-	-
Public Sector Net Borrowing (Pounds) (AUG)	21-09-2017	8:30	GBP	-	-
All Industry Activity Index (MoM) (JUL)	21-09-2017	4:30	JPY	-	0.004
BOJ Kuroda speaks at press conference after MPM	21-09-2017	6:30	JPY	-	-
Foreign Buying Japan Bonds (Yen) (SEP 15)	21-09-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (SEP 15)	21-09-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (SEP 15)	21-09-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (SEP 15)	21-09-2017	23:50	JPY	-	-
Nationwide Department Store Sales (YoY) (AUG)	21-09-2017	6:00	JPY	-	(0.014)
Supermarket Sales (YoY) (AUG)	21-09-2017	5:00	JPY	-	0
Tokyo Department Store Sales (YoY) (AUG)	21-09-2017	6:00	JPY	-	(0.009)
Credit Card Spending (MoM) (AUG)	21-09-2017	3:00	NZD	-	0.009
Credit Card Spending (YoY) (AUG)	21-09-2017	3:00	NZD	-	0.072



Continuing Claims (SEP 09)	21-09-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (SEP 15)	21-09-2017	14:30	USD	-	91
EIA Working Natural Gas Implied Flow (SEP 15)	21-09-2017	14:30	USD	-	91
House Price Index (MoM) (JUL)	21-09-2017	13:00	USD	-	0.001
Household Change in Net Worth (2Q)	21-09-2017	16:00	USD	-	-
Initial Jobless Claims (SEP 16)	21-09-2017	12:30	USD	-	-
Leading Indicators (AUG)	21-09-2017	14:00	USD	-	0.003
Philadelphia Fed Business Outlook (SEP)	21-09-2017	12:30	USD	-	18.9
U.S. to Sell USD11 Bln 10-Year TIPS Reopening	21-09-2017	17:00	USD	-	-

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