



22 Jun.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,695	0.6 %	4.9 %
BSE SENSEX	31,284	(0.0) %	5.3 %
CNX BANK	23,890	0.8 %	10.9 %
CNX MIDCAP	18,139	0.5 %	4.7 %
CNX SMALLCAP	7,502	0.7 %	6.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,410	(0.3) %	7.7 %
S&P 500	2,436	(0.1) %	7.9 %
FTSE 100	7,448	(0.3) %	3.8 %
HANG SENG	25,695	(0.6) %	16.0 %
NIKKEI	20,139	(0.5) %	2.8 %
SHANGHAI COMPOSITE	3,156	0.5 %	0.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.52	0.0 %	(4.3) %
EUR/USD	1.12	0.3 %	5.3 %
GBP/USD	1.27	0.3 %	3.0 %
USD/JPY	111.13	(0.2) %	(4.2) %
USD/AUD	1.32	0.3 %	(3.2) %
USD/SGD	1.39	(0.0) %	(2.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	(1.6) %	(18.7) %
Gold(INR/10g)	28,567	0.1 %	2.7 %
Gold Comex(USD/oz)	1,254	0.6 %	8.4 %
SILVER(INR/1Kg)	38,094	(0.4) %	(2.1) %
Aluminium(USD/MT)	1,866	(1.2) %	9.6 %
Copper(USD/MT)	5,650	(0.4) %	1.4 %

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: After reporting a notable decrease in US existing home sales in the previous month, the National Association of Realtors released a report on Wednesday showing an unexpected rebound in existing home sales in the month of May. NAR said existing home sales climbed by 1.1% to an annual rate of 5.62 million. Existing risks to global growth such as an abrupt tightening of financial conditions likely eased over the past year, thanks to careful communication by the US Federal Reserve, but new threats have emerged due to high policy uncertainty surrounding the fiscal and trade plans of the Trump administration, the European Central Bank said Wednesday.

Global Equities: After ending the previous session mostly lower, US stocks turned in a mixed performance. While the Nasdaq climbed firmly into positive territory, the Dow and the S&P 500 pulled back further off the record closing highs set on Monday.

Indian Economy: In view of the long gestation period and showing negative returns, industry body ASSOCHAM has suggested that infrastructure and transportation such as road and railway sectors should continue to be exempted under Goods and Services Tax (GST) regime. In a note submitted to the Finance Ministry, ASSOCHAM has suggested that to avoid accumulation of input tax credit with the contractors, a similar exemption should be granted in GST on direct procurements made by the contractors for use in such projects. Further withdrawal of exemption on existing projects will have a negative impact on business revenues.

Equity Markets: Local stocks shut shop with small losses on negative global cues yesterday. Engineering and construction major L&T rose on high volumes on reports the Government of India offloaded stake in the company via block deals today, 21 June 2017. Most PSU bank stocks rose. Private bank stocks saw mixed trend. Most metal and mining stocks fell. Shares of aviation firm rose as crude oil prices extended recent losses.

Corporate News: Reliance Communications clarified with regards to news titled 'Rcom puts Mumbai, Delhi real estate assets on the block to pare debt', that the company has initiated the monetization programme for its real estate properties. Piramal Enterprises announced that a meeting of the administrative committee of the board will be held on 27 June 2017 for consideration of issue of secured non-convertible debentures of upto Rs 500 crore on private placement basis. Tata Motors said that duly authorised committee approved offering for subscription, on a private placement basis, up to 5,000 rated, listed, unsecured, 7.50% coupon, redeemable, non-convertible debentures (NCDs) of face value Rs 10 lakh each, at par, aggregating up to Rs 500 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(45.7)	17.0	27.1
MF(INR cr)	214.2	406.1	489.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	29,143	26,405	29,486
F&O(INR cr)	503,250	437,242	507,267

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.8	10.5	11.5
NSE VIX	10.9	11.0	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	23,709	0.0 %	10.0 %	Energy	11,898	(0.3) %	0.7 %
IT	10,223	(0.6) %	(3.5) %	Pharma	9,457	(0.3) %	(10.0) %
Metals	2,954	(1.2) %	(4.9) %	Finance	9,694	0.1 %	9.8 %
Auto	10,836	(0.6) %	9.2 %	PSU	3,496	0.3 %	(0.9) %
FMCG	26,257	0.8 %	11.1 %	Real Estate	272	0.6 %	24.2 %

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>
Hind. Unil	1,123	2.8 %	22.0 %	Oil India	287	(2.9) %	(13.2) %
Britannia	3,670	2.4 %	8.2 %	Hindalco I	197	(2.7) %	1.5 %
Colgate-Pa	1,102	1.9 %	9.5 %	O N G C	165	(2.5) %	(11.3) %
United Spi	2,321	1.7 %	13.4 %	Tata Motor	457	(2.2) %	(2.8) %
Punjab Nat	146	1.6 %	(2.5) %	Bosch	24,226	(2.0) %	7.0 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Retail Sales (MoM) (Apr)	22-06-2017	12:30	CAD	-	0.007
Retail Sales Less Autos (MoM) (Apr)	22-06-2017	12:30	CAD	-	(0.002)
Exports (MoM) (May)	22-06-2017	6:00	CHF	-	(0.025)
Imports (MoM) (May)	22-06-2017	6:00	CHF	-	0.026
SNB's Maechler Speaks in Zurich	22-06-2017	16:00	CHF	-	-
Trade Balance (Swiss franc) (May)	22-06-2017	6:00	CHF	-	-
ECB Publishes Economic Bulletin	22-06-2017	8:00	EUR	-	-
Euro-Zone Consumer Confidence (Jun A)	22-06-2017	14:00	EUR	-	(3.3)
BOE's Forbes speaks in London	22-06-2017	18:00	GBP	-	-
CBI Trends Selling Prices (Jun)	22-06-2017	10:00	GBP	-	23
CBI Trends Total Orders (Jun)	22-06-2017	10:00	GBP	-	9
BOJ Iwata speaks in Aomori	22-06-2017	1:30	JPY	-	-
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Overnight Rate (22 Jun)	22-06-2017	18:00	MXN	-	0.0675
Credit Card Spending (MoM) (May)	22-06-2017	3:00	NZD	-	0.009
Credit Card Spending (YoY) (May)	22-06-2017	3:00	NZD	-	0.064
Continuing Claims (10 Jun)	22-06-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (16 Jun)	22-06-2017	14:30	USD	-	78
EIA Working Natural Gas Implied Flow (16 Jun)	22-06-2017	14:30	USD	-	78
Fed's Powell Speaks Before Senate Banking Committee	22-06-2017	14:00	USD	-	-
House Price Index (MoM) (Apr)	22-06-2017	13:00	USD	-	0.006
Initial Jobless Claims (17 Jun)	22-06-2017	12:30	USD	-	-
Kansas City Fed Manf. Activity (Jun)	22-06-2017	15:00	USD	-	8
Leading Indicators (May)	22-06-2017	14:00	USD	-	0.003
U.S. to Sell USD5 Bln 30-Year TIPS Reopening	22-06-2017	17:00	USD	-	-

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