



22 Aug.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,765	0.1 %	5.7 %
BSE SENSEX	31,259	(0.8) %	4.7 %
CNX BANK	23,882	(0.2) %	10.8 %
CNX MIDCAP	17,687	(0.5) %	2.0 %
CNX SMALLCAP	7,396	(0.2) %	4.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,704	0.1 %	9.2 %
S&P 500	2,428	0.1 %	7.6 %
FTSE 100	7,319	(0.1) %	2.0 %
HANG SENG	27,155	0.4 %	22.6 %
NIKKEI	19,393	(0.4) %	(1.0) %
SHANGHAI COMPOSITE	3,287	0.6 %	4.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.14	(0.0) %	(4.9) %
EUR/USD	1.18	0.4 %	11.4 %
GBP/USD	1.29	0.2 %	4.8 %
USD/JPY	109.23	0.0 %	(5.8) %
USD/AUD	1.26	(0.1) %	(7.9) %
USD/SGD	1.36	(0.1) %	(4.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	47	(2.4) %	(9.5) %
Gold(INR/10g)	28,944	(0.7) %	4.1 %
Gold Comex(USD/oz)	1,294	0.2 %	11.8 %
SILVER(INR/1Kg)	38,848	(0.7) %	(0.2) %
Aluminium(USD/MT)	2,085	(1.0) %	22.5 %
Copper(USD/MT)	6,515	1.0 %	16.9 %

**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:** With consumer expectations showing a significant rebound, the University of Michigan released a report on Friday showing a much bigger than expected improvement in US consumer sentiment in the month of August. The report said the preliminary reading on the consumer sentiment index for August jumped to 97.6. The euro area current account surplus declined to the lowest in nearly three years in June, the European Central Bank said Friday. The current account surplus fell to EUR 21.2 billion in June from EUR 30.5 billion in May. This was the lowest level since August 2014. House prices in majority of the Chinese cities increased in July, figures from the National Bureau of Statistics showed. On a monthly basis, house prices climbed 56 cities out of 70 surveyed by the government. It fell in 9 cities and remained flat in 5 cities.

**Global Equities:** US stocks showed a lack of direction over the course of the trading day on Friday following the sell-off seen in the previous session.

**Indian Economy:** The total sown area as on 18th August 2017, as per reports received from States, stands at 976.34 lakh hectare as compared to 984.57 lakh hectare at this time last year. This marks a modest drop of 0.84%. Acreage under Rice is up 0.42%, Sugarcane is up 9% while Cotton is up by a sharp 16%. However, area under Oilseeds is down 10%, Coarse Cereals is down 4% and Pulses is down 3.50%.

**Equity Markets:** Key benchmark indices mirrored decline in global stock markets on rising doubts about US President Donald Trump's ability to deliver his economic agenda. Bulk of the steep market slide was triggered by a sharp slump in index heavyweight and IT major Infosys. IT major Infosys fell 9.60%. Vishal Sikka has resigned as managing director and chief executive officer of Infosys. The board has accepted his resignation with immediate effect, the IT major said in a statement. Infosys said U.B. Pravin Rao, its chief operating officer, has been named as interim managing director and chief executive.

**Corporate News:** State-run power transmission utility Power Grid Corp said it will get a loan of \$500 million from the Asian Development Bank (ADB) for its various projects. Infosys has said there is no change in its buyback plans, under which it could return as much as Rs. 13,000 crore to its shareholders. As many as 322 infrastructure projects worth Rs 150 crore or above each have seen cost overrun of Rs 1.71 lakh crore due to delays and other reasons by March 2017, according to a report. Total original cost of implementation of the 1,231 projects was Rs 15,59,571.06 crore and their anticipated completion cost is likely to be Rs 17,31,162.47 crore, which reflects overall cost overruns of Rs 1,71,591.41 crore (11 per cent of original cost), a flash report by the Ministry of Statistics and Programme Implementation (MoSPI) said. Out of 1,231 projects, a total 322 projects reported cost overrun, the report said.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(288.5)	(123.5)	7.4
MF(INR cr)	(38.4)	554.3	480.4

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	28,662	30,895	30,419
F&O(INR cr)	504,350	661,800	564,906

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.2	12.2	11.3
NSE VIX	14.8	13.3	11.6

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,937	(0.6) %	11.1 %	Energy	12,796	(1.3) %	8.3 %
IT	10,440	(1.2) %	(1.4) %	Pharma	8,490	(1.7) %	(19.2) %
Metals	3,338	(1.4) %	7.5 %	Finance	9,893	(0.5) %	12.1 %
Auto	10,573	(1.0) %	6.6 %	PSU	3,246	(1.8) %	(7.9) %
FMCG	25,599	(0.5) %	8.3 %	Real Estate	269	(1.0) %	22.6 %

## 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>
Axis Bank	495	0.9 %	(1.2) %	Infosys	873	(5.4) %	(13.4) %
Emami	1,110	0.8 %	5.8 %	Oil India	273	(4.8) %	(17.4) %
M & M	1,379	0.6 %	7.2 %	B H E L	125	(4.1) %	(25.4) %
TCS	2,529	0.6 %	4.9 %	UPL	811	(4.0) %	10.2 %
Colgate-Pa	1,080	0.6 %	7.3 %	Power Fin.	119	(3.7) %	(19.8) %

## 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) (JUN)	22-08-2017	12:30	CAD	-	0.006
Retail Sales Less Autos (MoM) (JUN)	22-08-2017	12:30	CAD	-	(0.001)
Exports (MoM) (JUL)	22-08-2017	06:00	CHF	-	(0.019)
Imports (MoM) (JUL)	22-08-2017	06:00	CHF	-	(0.005)
Trade Balance (Swiss franc) (JUL)	22-08-2017	06:00	CHF	-	-
Conference Board China July Leading Economic Index	22-08-2017	13:00	CNY	-	-
ECB's Constancio Speaks at Economists' Congress in Lisbon	22-08-2017	12:00	EUR	-	-
Euro-Zone ZEW Survey (Economic Sentiment) (AUG)	22-08-2017	09:00	EUR	-	35.6
German ZEW Survey (Current Situation) (AUG)	22-08-2017	09:00	EUR	-	86.4
German ZEW Survey (Economic Sentiment) (AUG)	22-08-2017	09:00	EUR	-	17.5
CBI Trends Selling Prices (AUG)	22-08-2017	10:00	GBP	-	9
CBI Trends Total Orders (AUG)	22-08-2017	10:00	GBP	-	10
Central Government NCR (JUL)	22-08-2017	08:30	GBP	-	-
PSNB ex Banking Groups (JUL)	22-08-2017	08:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (JUL)	22-08-2017	08:30	GBP	-	-
Public Sector Net Borrowing (Pounds) (JUL)	22-08-2017	08:30	GBP	-	-
Supermarket Sales (YoY) (JUL)	22-08-2017	05:00	JPY	-	(0.012)
House Price Index (MoM) (JUN)	22-08-2017	13:00	USD	-	0.004
House Price Purchase Index (QoQ) (2Q)	22-08-2017	13:00	USD	-	0.014
Richmond Fed Manufacturing Index (AUG)	22-08-2017	14:00	USD	-	14
U.S. to Sell 4-Week Bills	22-08-2017	15:30	USD	-	-

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