



22 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,039	(0.8) %	8.7 %
BSE SENSEX	32,370	(0.1) %	7.4 %
CNX BANK	24,528	(1.1) %	13.8 %
CNX MIDCAP	18,757	(0.9) %	8.2 %
CNX SMALLCAP	7,880	(1.0) %	11.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,359	(0.2) %	12.5 %
S&P 500	2,501	(0.3) %	10.8 %
FTSE 100	7,264	(0.1) %	1.2 %
HANG SENG	28,110	(0.1) %	26.9 %
NIKKEI	20,347	0.2 %	3.8 %
SHANGHAI COMPOSITE	3,358	(0.2) %	7.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.80	0.8 %	(3.9) %
EUR/USD	1.20	0.7 %	12.7 %
GBP/USD	1.36	0.8 %	10.4 %
USD/JPY	112.13	(0.4) %	(3.3) %
USD/AUD	1.26	1.2 %	(7.6) %
USD/SGD	1.35	(0.1) %	(5.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	0.3 %	(3.4) %
Gold(INR/10g)	29,576	(0.6) %	6.3 %
Gold Comex(USD/oz)	1,300	(0.2) %	12.3 %
SILVER(INR/1Kg)	39,274	(1.2) %	0.9 %
Aluminium(USD/MT)	2,154	(0.5) %	26.6 %
Copper(USD/MT)	6,408	(1.7) %	15.0 %

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: Reflecting large positive contributions from building permits, the yield spread, and consumer expectations, the Conference Board released a report on Thursday showing a bigger than expected increase by its index of leading US economic indicators. The Conference Board said its leading economic index climbed by 0.4% in August after rising by 0.3% in July. First-time claims for US unemployment benefits unexpectedly decreased in the week ended September 16th. The initial jobless claims fell to 259,000, a decrease of 23,000 from the previous week's revised level of 282,000. The Philly Fed said its index for current manufacturing activity rose to 23.8 in September from 18.9 in August. The increase partly reflected accelerations in the pace of growth in new orders and shipments. The new orders index jumped to 29.5 in September from 20.4 in August, while the shipments index soared to 37.8 from 29.4.

Global Equities: US stocks ended with modest losses on Thursday. With the drop on the day, the Dow and the S&P 500 pulled back off their record closing highs.

Indian Economy: The transitory effects of demonetisation and of the implementation of the Goods and Services Tax (GST) have led to a downward revision in Indian growth projections, to 6.7% in 2017 and 7.2% in 2018. In the longer run, the GST is expected to boost investment, productivity and growth, noted the OECD in a latest update.

Equity Markets: The local stocks closed with small losses. Market participants lacked strong buying conviction amid subdued trading on Asian bourses after the outcome of the Federal Reserve meeting. Pharma stocks surged as rupee weakened against the dollar. Key indices opened the session with small gains. Later, they slipped into the negative zone tracking subdued trading in Asian bourses and traded with modest losses till mid-afternoon trade. Indices trimmed intraday losses in late trade.

Corporate News: Tata group companies will be in focus today. Shareholders of Tata Sons, the holding company of the Tata group, yesterday, 21 September 2017 voted in favour of turning it into a private limited company despite vehement opposition from ousted chairman Cyrus Mistry's family firms that own a minority stake. The development implies that Mistry's Shapoorji Pallonji group won't be able to sell its minority stake in Tata Sons without board approval. InterGlobe Aviation announced that a committee of the Board of Directors approved allotment of 3.35 crore equity shares to qualified institutional buyers at an issue price of Rs 1,130 per share. Shares of Reliance Home Finance will list on exchanges today, 22 September 2017. Reliance Home Finance was demerged from Reliance Capital and shareholders of Reliance Capital have already received one share of Reliance Home Finance for every share held in Reliance Capital as on 6 September 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(137.6)	(54.4)	(4.9)
MF(INR cr)	730.0	549.6	572.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,788	30,330	30,301
F&O(INR cr)	1,160,483	554,652	576,447

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.7	10.7	11.2
NSE VIX	11.6	12.1	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,799	(0.7) %	15.1 %	Energy	13,334	(0.6) %	12.8 %
IT	10,654	0.0 %	0.6 %	Pharma	9,630	3.3 %	(8.3) %
Metals	3,639	(0.6) %	17.2 %	Finance	10,219	(0.3) %	15.8 %
Auto	11,052	(0.5) %	11.4 %	PSU	3,244	(1.0) %	(8.0) %
FMCG	25,490	(0.8) %	7.8 %	Real Estate	285	(1.5) %	30.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Dr Reddy's	2,487	7.4 %	(9.4) %	United Spi	2,564	(2.6) %	25.3 %
Torrent Ph	1,344	6.8 %	(10.7) %	DLF	185	(2.5) %	26.0 %
Divi's Lab	991	5.1 %	58.0 %	Zee Entert	536	(2.5) %	1.3 %
Cipla	592	3.9 %	(0.1) %	Marico	323	(2.4) %	9.1 %
Cadila Hea	504	3.6 %	13.9 %	GAIL (Indi	408	(2.3) %	6.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (AUG)	22-09-2017	12:30	CAD	-	130.4
Consumer Price Index (MoM) (AUG)	22-09-2017	12:30	CAD	-	0
Consumer Price Index (YoY) (AUG)	22-09-2017	12:30	CAD	-	0.012
CPI Core- Common (YoY) (AUG)	22-09-2017	12:30	CAD	-	0.014
CPI Core- Median (YoY) (AUG)	22-09-2017	12:30	CAD	-	0.017
CPI Core- Trim (YoY) (AUG)	22-09-2017	12:30	CAD	-	0.013
Retail Sales (MoM) (JUL)	22-09-2017	12:30	CAD	-	0.001
Retail Sales Less Autos (MoM) (JUL)	22-09-2017	12:30	CAD	-	0.007
SNB's D. Moser Speaks at SIX & SFAA event in Zurich	22-09-2017	9:00	CHF	-	-
ECB Executive Board member Coeure speaks in Sarajevo	22-09-2017	7:15	EUR	-	-
ECB President Draghi participates in roundtable in Dublin	22-09-2017	9:30	EUR	-	-
ECB President Mario Draghi speaks in Dublin	22-09-2017	8:00	EUR	-	-
ECB Vice-President Constancio is chairing a panel in Frankfurt	22-09-2017	13:15	EUR	-	-
ECB Vice-President Constancio speaks in Frankfurt	22-09-2017	11:15	EUR	-	-
French Gross Domestic Product (QoQ) (2Q F)	22-09-2017	6:45	EUR	-	0.005
French Gross Domestic Product (YoY) (2Q F)	22-09-2017	6:45	EUR	-	0.017
Markit Eurozone Composite PMI (SEP P)	22-09-2017	8:00	EUR	-	55.7
Markit Eurozone Manufacturing PMI (SEP P)	22-09-2017	8:00	EUR	-	57.4
Markit Eurozone Services PMI (SEP P)	22-09-2017	8:00	EUR	-	54.7
Markit France Composite PMI (SEP P)	22-09-2017	7:00	EUR	-	55.2
Markit France Manufacturing PMI (SEP P)	22-09-2017	7:00	EUR	-	55.8
Markit France Services PMI (SEP P)	22-09-2017	7:00	EUR	-	54.9
Markit Germany Services PMI (SEP P)	22-09-2017	7:30	EUR	-	53.5
Markit/BME Germany Composite PMI (SEP P)	22-09-2017	7:30	EUR	-	55.8
Markit/BME Germany Manufacturing PMI (SEP P)	22-09-2017	7:30	EUR	-	59.3
CBI Trends Selling Prices (SEP)	22-09-2017	10:00	GBP	-	19
CBI Trends Total Orders (SEP)	22-09-2017	10:00	GBP	-	13
Baker Hughes U.S. Rig Count (SEP 22)	22-09-2017	17:00	USD	-	936
North America Crude Oil at Dallas/Kansas City Fed Oil Conference	22-09-2017	12:00	USD	-	-



Fed's Kaplan Speaks at Dallas/Kansas City Fed Oil Conference	22-09-2017	17:30	USD	-	-
Fed's Williams Speaks to Media at Swiss National Bank Event	22-09-2017	10:00	USD	-	-
Markit US Composite PMI (SEP P)	22-09-2017	13:45	USD	-	55.3
Markit US Manufacturing PMI (SEP P)	22-09-2017	13:45	USD	-	52.8
Markit US Services PMI (SEP P)	22-09-2017	13:45	USD	-	56

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