



23 Jun.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,593	(0.4) %	3.8 %
BSE SENSEX	31,291	0.0 %	4.4 %
CNX BANK	23,637	(0.4) %	9.7 %
CNX MIDCAP	17,729	(1.0) %	2.3 %
CNX SMALLCAP	7,336	(0.9) %	3.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,397	(0.1) %	7.6 %
S&P 500	2,435	(0.1) %	7.8 %
FTSE 100	7,439	(0.1) %	3.6 %
HANG SENG	25,675	(0.1) %	15.9 %
NIKKEI	20,111	(0.1) %	2.6 %
SHANGHAI COMPOSITE	3,147	(0.3) %	0.4 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.60	0.1 %	(4.2) %
EUR/USD	1.12	(0.1) %	5.2 %
GBP/USD	1.27	0.2 %	3.2 %
USD/JPY	111.32	0.2 %	(4.0) %
USD/AUD	1.33	0.1 %	(3.1) %
USD/SGD	1.39	0.1 %	(2.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	0.5 %	(18.3) %
Gold(INR/10g)	28,702	0.5 %	3.2 %
Gold Comex(USD/oz)	1,252	(0.2) %	8.2 %
SILVER(INR/1Kg)	38,357	0.7 %	(1.4) %
Aluminium(USD/MT)	1,872	0.3 %	10.0 %
Copper(USD/MT)	5,736	1.5 %	2.9 %

**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:** Reflecting widespread improvement, the Conference Board released a report on Thursday showing that its index of leading US economic indicators rose in line with the estimates in the month of May. The Conference Board said its leading economic index climbed by 0.3% in May after rising by a downwardly revised 0.2% in April. Eurozone's solid growth momentum is set to continue in the second quarter, mainly driven by domestic demand, and there are signs of a build-up of pipeline inflationary pressures, the European Central Bank said in its latest economic bulletin released on Thursday. Overall, incoming data point to solid growth in the second quarter of 2017, the bank said.

**Global Equities:** US stocks witnessed modest strength initially on Thursday. The major averages pulled back near the unchanged line, with the Dow and the S&P 500 dipping into negative territory.

**Indian Economy:** Domestic crude oil production during May, 2017 was 3099.48 TMT which is 0.35% lower than target but 0.73% higher when compared with May 2016. Cumulative crude oil production during April-May, 2017 was 6038.33 TMT which is 1.16% lower than target for the period but 0.07% higher than production during corresponding period of last year.

**Equity Markets:** A divergent trend was witnessed as the barometer index, the S&P BSE Sensex, settled with marginal gains while the Nifty 50 index registered minor losses. Domestic stocks saw high intraday volatility. The Sensex reversed trend after hitting record high level in early afternoon trade. The Nifty reversed trend after hitting its highest intraday level in more than two weeks in early afternoon trade.

**Corporate News:** Adani Ports & Special Economic Zone said that its finance committee approved the issuance of fixed rate senior unsecured notes aggregating \$500 million and has approved the pricing tenure and other terms of the note. The notes will mature on 30 July 2017. HDFC has executed a subscription agreement with International Finance Corporation (IFC), Washington whereby IFC would subscribe to the rupee denominated bonds to be issued overseas by the company upto an amount of Rs 1300 crore, subject to the approval of the Reserve Bank of India. V-Mart Retail has opened two stores in the State of Uttar Pradesh and Madhya Pradesh. With this, the total number of stores increases to 148 stores.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(13.7)	15.0	26.3
MF(INR cr)	214.2	406.1	489.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,956	26,689	29,513
F&O(INR cr)	1,050,456	475,567	516,967

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.5	10.5	11.5
NSE VIX	11.2	11.0	11.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,736	0.1 %	10.2 %	Energy	11,811	(0.7) %	(0.1) %
IT	10,200	(0.2) %	(3.7) %	Pharma	9,472	0.2 %	(9.8) %
Metals	2,913	(1.4) %	(6.2) %	Finance	9,721	0.3 %	10.1 %
Auto	10,821	(0.1) %	9.1 %	PSU	3,515	0.5 %	(0.3) %
FMCG	26,188	(0.3) %	10.8 %	Real Estate	268	(1.6) %	22.2 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun Pharma	539	2.0 %	(22.2) %	I O C L	394	(3.6) %	3.2 %
S A I L	58	2.0 %	(7.4) %	H P C L	512	(3.3) %	(1.3) %
Ambuja Cem	245	1.9 %	3.1 %	NHPC Ltd	33	(2.6) %	2.8 %
Hind.Zinc	253	1.7 %	(13.3) %	O N G C	160	(2.6) %	(13.6) %
Aurobindo	666	1.6 %	(2.5) %	Hind. Unil	1,094	(2.6) %	18.8 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (May)	23-06-2017	12:30	CAD	-	130.4
Consumer Price Index (MoM) (May)	23-06-2017	12:30	CAD	-	0.004
Consumer Price Index (YoY) (May)	23-06-2017	12:30	CAD	-	0.016
CPI Core- Common (YoY)% (May)	23-06-2017	12:30	CAD	-	0.013
CPI Core- Median (YoY)% (May)	23-06-2017	12:30	CAD	-	0.016
CPI Core- Trim (YoY)% (May)	23-06-2017	12:30	CAD	-	0.013
KOF Institute Summer Economic Forecast	23-06-2017	7:00	CHF	-	-
French Gross Domestic Product (QoQ) (1Q F)	23-06-2017	6:45	EUR	-	0.004
French Gross Domestic Product (YoY) (1Q F)	23-06-2017	6:45	EUR	-	0.01
Markit Eurozone Composite PMI (Jun P)	23-06-2017	8:00	EUR	-	56.8
Markit Eurozone Manufacturing PMI (Jun P)	23-06-2017	8:00	EUR	-	57
Markit Eurozone Services PMI (Jun P)	23-06-2017	8:00	EUR	-	56.3
Markit France Composite PMI (Jun P)	23-06-2017	7:00	EUR	-	56.9
Markit France Manufacturing PMI (Jun P)	23-06-2017	7:00	EUR	-	53.8
Markit France Services PMI (Jun P)	23-06-2017	7:00	EUR	-	57.2
Markit Germany Services PMI (Jun P)	23-06-2017	7:30	EUR	-	55.4
Markit/BME Germany Composite PMI (Jun P)	23-06-2017	7:30	EUR	-	57.4
Markit/BME Germany Manufacturing PMI (Jun P)	23-06-2017	7:30	EUR	-	59.5
Nikkei Japan PMI Mfg (Jun P)	23-06-2017	0:30	JPY	-	53.1
Baker Hughes U.S. Rig Count (23 Jun)	23-06-2017	17:00	USD	-	933
Fed's Bullard Speaks about Monetary Policy in Nashville	23-06-2017	15:15	USD	-	-
Fed's Mester Speaks in Cleveland	23-06-2017	16:40	USD	-	-
Fed's Powell Speaks in Chicago on Central Clearing	23-06-2017	18:15	USD	-	-
Markit US Composite PMI (Jun P)	23-06-2017	13:45	USD	-	53.6
Markit US Manufacturing PMI (Jun P)	23-06-2017	13:45	USD	-	52.7
Markit US Services PMI (Jun P)	23-06-2017	13:45	USD	-	53.6
New Home Sales (May)	23-06-2017	14:00	USD	-	-
New Home Sales (MoM) (May)	23-06-2017	14:00	USD	-	(0.114)



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