



23 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,804	0.4 %	6.1 %
BSE SENSEX	31,292	0.1 %	5.1 %
CNX BANK	24,165	0.8 %	12.1 %
CNX MIDCAP	17,770	0.7 %	2.5 %
CNX SMALLCAP	7,445	1.1 %	5.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,900	0.9 %	10.2 %
S&P 500	2,453	1.0 %	8.6 %
FTSE 100	7,382	0.9 %	2.8 %
HANG SENG	27,402	0.9 %	23.7 %
NIKKEI	19,384	(0.1) %	(1.1) %
SHANGHAI COMPOSITE	3,290	0.1 %	4.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.11	(0.1) %	(4.9) %
EUR/USD	1.18	(0.4) %	11.0 %
GBP/USD	1.28	(0.6) %	4.2 %
USD/JPY	109.64	0.4 %	(5.5) %
USD/AUD	1.27	0.5 %	(7.4) %
USD/SGD	1.36	0.1 %	(4.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.6 %	(9.0) %
Gold(INR/10g)	28,919	(0.1) %	4.0 %
Gold Comex(USD/oz)	1,290	(0.3) %	11.5 %
SILVER(INR/1Kg)	38,837	(0.0) %	(0.2) %
Aluminium(USD/MT)	2,105	1.0 %	23.6 %
Copper(USD/MT)	6,584	1.1 %	18.1 %

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: Germany's economic confidence weakened for the third straight month to hit a 10-month low in August. The ZEW Indicator of Economic Sentiment declined to 10.0 in August from 17.5 in July, survey data from the Mannheim-based Centre for European Economic Research/ZEW showed Tuesday. This was the lowest score since October 2016, when the reading was 6.2. The indicator has remained significantly below the long-term average of 23.8 points and the expected level of 15.0. Meanwhile, the assessment of the current economic situation improved unexpectedly in August. The corresponding index rose to 86.7 from 86.4 in July, while it was forecast to drop to 85.2. The manufacturing sector in Japan continued to expand in August, and at a faster pace, the latest survey from Nikkei revealed on Wednesday with a Manufacturing PMI score of 52.8. That's up from 52.1 in July, and it moves farther above the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: US stocks moved sharply higher over the course of the trading day on Tuesday. The tech-heavy Nasdaq rebounded strongly after ending the previous session at its lowest closing level in well over a month.

Indian Economy: In the seventeenth Meeting of the Financial Stability and Development Council (FSDC), it was noted that India has macro-economic stability today on the back of improvements in its macro-economic fundamentals, structural reforms with the launch of the Goods and Services Tax (GST), action being taken to address the Twin Balance Sheet (TBS) challenge, extraordinary financial market confidence, reflected in high and rising bond and especially stock valuations and long-term positive consequences of demonetization. The Council also discussed the issues and challenges facing the Indian economy and Members agreed on the need to keep constant vigil and be in a state of preparedness of managing any external and internal vulnerabilities.

Equity Markets: Key benchmark indices registered small gains in a range-bound trading session on bargain hunting. Key indices opened the session higher on bargain hunting after registering losses in the preceding two trading sessions. Later, the indices witnessed volatility even as they were mostly confined to positive territory. Gains in European and Asian bourses also helped key indices to settle with gains. Overseas, European and Asian shares edged higher as investors turned their attention to the US Federal Reserve's annual symposium in Jackson Hole at the end of the week.

Corporate News: Shares of Eris Lifesciences will be in focus. The Reserve Bank of India (RBI) notified after market hours yesterday, 22 August 2017, that that foreign institutional investors (FIIs)/foreign portfolios investors (FPIs) investment limit under portfolio investment scheme in Eris Lifesciences has increased from 24% to 49% of its paid up capital. Further, it is notified that the NRI investment limit under portfolio investment scheme in Eris Lifesciences has increased from 10% to 24% of its paid up capital. Power Grid Corporation of India (PGCIL) said it will seek shareholders' nod for raising borrowing limits to Rs 1.80 lakh crore from Rs 1.50 lakh crore at present. It will also seek shareholders' nod to raise funds upto Rs 20000 crore from domestic market under private placement in up to 20 tranches. The company's shareholders will meet at the annual general meeting on 19 September 2017. Balaji Telefilms' board approved allotment of 2.52 crore equity shares at Rs 164 for a total consideration of Rs 413.28 crore to Reliance Industries on a preferential basis through a private placement.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(279.5)	(135.5)	4.3
MF(INR cr)	(38.4)	554.3	480.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,744	30,618	30,381
F&O(INR cr)	628,156	659,557	565,558

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.4	12.2	11.3
NSE VIX	14.1	13.4	11.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,974	0.2 %	11.3 %	Energy	12,843	0.4 %	8.7 %
IT	10,446	0.1 %	(1.4) %	Pharma	8,567	0.9 %	(18.4) %
Metals	3,340	0.1 %	7.6 %	Finance	9,910	0.2 %	12.3 %
Auto	10,483	(0.8) %	5.7 %	PSU	3,233	(0.4) %	(8.3) %
FMCG	25,605	0.0 %	8.3 %	Real Estate	266	(0.9) %	21.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Container	1,276	4.5 %	26.2 %	Rural Elec	153	(5.2) %	(15.0) %
H P C L	450	3.7 %	30.1 %	Interglobe	1,229	(3.3) %	17.8 %
Dr Reddy's	1,984	2.7 %	(27.7) %	Motherson	311	(3.0) %	24.1 %
B P C L	510	2.5 %	19.9 %	Sun TV Net	698	(2.9) %	(12.2) %
I O C L	423	2.4 %	11.0 %	DLF	175	(2.8) %	19.4 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (JUL)	23-08-2017	01:00	AUD	-	0.009
ECB's Draghi Speaks in Lindau, Germany	23-08-2017	07:00	EUR	-	-
Euro-Zone Consumer Confidence (AUG A)	23-08-2017	14:00	EUR	-	(1.7)
Markit Eurozone Composite PMI (AUG P)	23-08-2017	08:00	EUR	-	55.7
Markit Eurozone Manufacturing PMI (AUG P)	23-08-2017	08:00	EUR	-	56.6
Markit Eurozone Services PMI (AUG P)	23-08-2017	08:00	EUR	-	55.4
Markit France Composite PMI (AUG P)	23-08-2017	07:00	EUR	-	55.6
Markit France Manufacturing PMI (AUG P)	23-08-2017	07:00	EUR	-	54.9
Markit France Services PMI (AUG P)	23-08-2017	07:00	EUR	-	56
Markit Germany Services PMI (AUG P)	23-08-2017	07:30	EUR	-	53.1
Markit/BME Germany Composite PMI (AUG P)	23-08-2017	07:30	EUR	-	54.7
Markit/BME Germany Manufacturing PMI (AUG P)	23-08-2017	07:30	EUR	-	58.1
BOJ Outright Bond Purchase 1~3 Years	23-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	23-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	23-08-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Year	23-08-2017	01:10	JPY	-	-
Foreign Buying Japan Bonds (Yen) (AUG 18)	23-08-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (AUG 18)	23-08-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (AUG 18)	23-08-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 18)	23-08-2017	23:50	JPY	-	-
Machine Tool Orders (YoY) (JUL F)	23-08-2017	06:00	JPY	-	0.263
Nikkei Japan PMI Mfg (AUG P)	23-08-2017	00:30	JPY	-	52.1
Balance (YTD) (New Zealand dollars) (JUL)	23-08-2017	22:45	NZD	-	-
Exports (New Zealand dollars) (JUL)	23-08-2017	22:45	NZD	-	-
Imports (New Zealand dollars) (JUL)	23-08-2017	22:45	NZD	-	-
Trade Balance (New Zealand dollars) (JUL)	23-08-2017	22:45	NZD	-	-
DOE Cushing OK Crude Inventory (AUG 18)	23-08-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 18)	23-08-2017	14:30	USD	-	-
DOE U.S. Distillate Inventories (AUG 18)	23-08-2017	14:30	USD	-	-



DOE U.S. Gasoline Inventories (AUG 18)	23-08-2017	14:30	USD	-	-
Fed's Kaplan Speaks to Oil Group in Midland, Texas	23-08-2017	13:05	USD	-	-
Markit US Composite PMI (AUG P)	23-08-2017	13:45	USD	-	54.6
Markit US Manufacturing PMI (AUG P)	23-08-2017	13:45	USD	-	53.3
Markit US Services PMI (AUG P)	23-08-2017	13:45	USD	-	54.7
MBA Mortgage Applications (AUG 18)	23-08-2017	11:00	USD	-	0.001
New Home Sales (JUL)	23-08-2017	14:00	USD	-	-
New Home Sales (MoM) (JUL)	23-08-2017	14:00	USD	-	0.008
U.S. to Sell USD13 Bln 2-Year Floating Rate Notes Reopening	23-08-2017	15:30	USD	-	-

..... End of Report

