MORNING EQUITIES UPDATE

23 Oct.2017

INDEX PERFORMANCE

INDIAN INDICES	*LATEST*	*% 1D*	*% YTD*
CNX NIFTY	10,147	(0.6) %	9.8 %
BSE SENSEX	32,390	(0.6) %	8.3 %
CNX BANK	24,010	(1.3) %	11.4 %
CNX MIDCAP	18,790	(0.4) %	8.4 %
CNX SMALLCAP	8,068	(0.1) %	14.1 %

GLOBAL INDICES	*LATEST*	*% 1D*	*% YTD*
DOW JONES	23,329	0.7 %	17.3 %
S&P 500	2,575	0.5 %	14.1 %
FTSE 100	7,523	0.0 %	4.8 %
HANG SENG	28,487	1.2 %	28.6 %
NIKKEI	21,458	0.0 %	9.5 %
SHANGHAI COMPOSITE	3,379	0.3 %	7.7 %

FOREX RATES

	LATEST	*% 1D*	*% YTD*
USD/INR	65.04	0.0 %	(3.5) %
EUR/USD	1.18	(0.2) %	11.2 %
GBP/USD	1.32	(0.2) %	7.2 %
USD/JPY	113.53	0.5 %	(2.1) %
USD/AUD	1.28	0.5 %	(6.5) %
USD/SGD	1.36	0.3 %	(4.8) %

COMMODITIES

	LATEST	*% 1D*	*% YTD*
WTI Crude(USD/bbl)	51	0.4 %	(1.6) %
Gold(INR/10g)	29,611	0.0 %	6.5 %
Gold Comex(USD/oz)	1,282	(0.3) %	10.8 %
SILVER(INR/1Kg)	39,267	0.0 %	0.9 %
Aluminium(USD/MT)	2,159	1.4 %	26.9 %
Copper(USD/MT)	7,009	1.3 %	25.7 %

FIXED INCOME

INTERBANK RATES	*LATEST*	*BPS 1D*	*BPS YTD*
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	0.1 %	(0.1) %

Global Economy: For the first time in the last twelve months, the US Conference Board released a report on Thursday showing an unexpected drop by its index of leading US economic indicators in the month of September. The Conference Board said its leading economic index dipped by 0.2%. The UK budget posted the smallest budget deficit in a decade for the month of September, suggesting that the borrowing is on the course to undershoot the full-year target. Public sector net borrowing, excluding banks, decreased by GBP 0.7 billion from the previous year to GBP 5.9 billion in September, the Office for National Statistics said Friday.

Global Equities: US stocks hit record highs once again amid supportive earnings and continued buying support fuelled by optimism on US tax reforms.

Indian Economy: The water storage available in 91 major reservoirs of the country for the week ending on October 18, 2017 was 110.012 BCM which is 70% of total storage capacity of these reservoirs. This percentage was at 68 for the week ending on October 12, 2017. The level of water storage in the week ending on October 18, 2017 was 93% of the storage of corresponding period of last year and 94% of storage of average of last ten years. States having better storage than last year for corresponding period are Himachal Pradesh, Punjab, West Bengal, Tripura, Uttarakhand, AP&TG (Two combined projects in both states), Andhra Pradesh, Karnataka, Kerala and Tamil Nadu. States having lesser storage than last year for corresponding period are Rajasthan, Jharkhand, Odisha, Gujarat, Maharashtra, Uttar Pradesh, Madhya Pradesh, Chhattisgarh and Telangana.

Equity Markets: Markets would be looking to catch up with the latest trends in global equities after an extended Diwali weekend. Trading for Samvat 2074 started on a weak note as key benchmark indices settled with modest losses as weakness in global stocks weighed on investors' sentiment.

Corporate News: ONGC has drawn a blueprint to raise crude oil production by 4 million tonne (MT) and almost double natural gas output by 2020 to meet. The state-owned firm will raise crude oil production from 22.6 MT in 2017-18 to 26.42 MT in 2021-22, according to media reports. Domestic crude steel production rose by 6.8% to 8.39 million tonnes (mt) in September 2017 compared to 7.86 mt in the same month last year, according to the official data. During April-September 2017, crude steel production was 49.764 mt, a growth of 4.5% over the same period of the last year, the Joint Plant Committee (JPC) under the Ministry of Steel said in a report. HCL Infosystems said it will raise Rs 499.09 crore from its existing shareholders by way of rights issue. The rights issue committee of the board has decided to issue equity share by way of rights issue to eligible shareholders of the company for an amount aggregating to Rs 499.09 crore, HCL Infosystems Ltd said in a BSE filing. The company said the rights issue is to be offered at a price of Rs 47, including a premium of Rs 45.

FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(38.9)	(62.6)	(16.2)
MF(INR cr)	946.8	583.0	617.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	6,678	29,229	30,548
F&O(INR cr)	147,064	614,476	592,989

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.0	9.8	11.0
NSE VIX	12.4	11.6	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,010	(1.3) %	11.4 %	Energy	13,980	(0.8) %	18.3 %
IT	10,891	(0.2) %	2.8 %	Pharma	9,594	(0.3) %	(8.7) %
Metals	3,820	(0.9) %	23.0 %	Finance	9,935	(1.0) %	12.6 %
Auto	11,108	(0.5) %	12.0 %	PSU	2,943	(0.7) %	(16.5) %
FMCG	25,580	(0.4) %	8.2 %	Real Estate	287	(0.2) %	31.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	91	2.9 %	7.2 %	ICICI Bank	258	(2.0) %	(1.1) %
Bharti Air	474	2.6 %	38.6 %	JSW Steel	254	(2.0) %	34.3 %
ICICI Pru	396	1.1 %	2.7 %	Shriram Tr	1,085	(1.8) %	(1.7) %
GlaxoSmith	4,976	1.0 %	(4.0) %	DLF	175	(1.7) %	19.3 %
P & G Hygi	8,686	0.9 %	17.6 %	Torrent Ph	1,362	(1.7) %	(9.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE

No Data Found

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