



24 May.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,402	0.2 %	1.8 %
BSE SENSEX	30,365	(0.7) %	1.9 %
CNX BANK	22,595	0.1 %	4.9 %
CNX MIDCAP	17,395	(0.2) %	0.4 %
CNX SMALLCAP	7,075	(0.0) %	0.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,938	0.2 %	5.3 %
S&P 500	2,398	0.2 %	6.2 %
FTSE 100	7,485	(0.2) %	4.3 %
HANG SENG	25,403	0.1 %	14.7 %
NIKKEI	19,613	(0.3) %	0.1 %
SHANGHAI COMPOSITE	3,062	(0.5) %	(2.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.89	0.4 %	(3.8) %
EUR/USD	1.12	(0.2) %	5.5 %
GBP/USD	1.30	(0.5) %	5.5 %
USD/JPY	111.84	0.5 %	(3.6) %
USD/AUD	1.34	(0.1) %	(2.1) %
USD/SGD	1.39	0.3 %	(2.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	2.3 %	(1.6) %
Gold(INR/10g)	28,853	0.6 %	3.7 %
Gold Comex(USD/oz)	1,251	(0.8) %	8.1 %
SILVER(INR/1Kg)	39,525	1.3 %	1.6 %
Aluminium(USD/MT)	1,926	(0.9) %	13.2 %
Copper(USD/MT)	5,661	(0.3) %	1.6 %

**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:** A report released by the Conference Board on Thursday showed that its index of leading US economic indicators rose in line with economist estimates in the month of April. The Conference Board said its leading economic index rose by 0.3% in April, matching the downwardly revised increase in March. After reporting an unexpected jump in U.S. new home sales in the previous month, the Commerce Department released a report on Tuesday showing a substantial pullback in new home sales in the month of April. The Commerce Department said new home sales plunged by 11.4% to an annual rate of 569,000.

**Global Equities:** US stocks witnessed a relatively lackluster performance during trading on Tuesday but managed to end the session modestly higher. The major averages closed higher for the fourth consecutive session.

**Indian Economy:** The Reserve Bank of India has outlined the steps taken and those on the anvil post the promulgation of the Banking Regulation (Amendment) Ordinance, 2017. The amendments to the BR Act 1949, introduced through the Ordinance, and the notification issued thereafter by the Central Government empower RBI to issue directions to any banking company or banking companies to initiate insolvency resolution process in respect of a default, under the provisions of the Insolvency and Bankruptcy Code, 2016 (IBC).

**Equity Markets:** Key benchmark indices suffered steep losses on reports that India has hit army posts across the Line of Control (LoC) that were providing cover for militants planning attacks. Key indices remained in the negative terrain for the most part of the session. The Sensex settled at its lowest level in more than one week. The Nifty settled at two-week low.

**Corporate News:** Tata Motors' consolidated net profit fell 16.79% to Rs 4336 crore on 2.86% fall in revenues to Rs 77272 crore in Q4 March 2017 over Q4 March 2016. The result was declared after market hours yesterday, 23 May 2017. Consolidated profit was lower due to translation impact from Pound to Indian Rupee. Adani Ports & Special Economic Zone and Lupin will announce Q4 results today, 24 May 2017. Karnataka Bank has entered into a distribution agreement to sell the mutual fund products of HDFC Capital Asset Management (HDFCAML). Mahabaleswara MS, Managing Director and Chief Executive Officer of Karnataka Bank said that investment in mutual funds will provide an opportunity to those customers who are uncomfortable in investing directly in stock markets.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	138.6	103.3	34.4
MF(INR cr)	8.6	353.2	505.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,227	29,845	30,138
F&O(INR cr)	796,711	507,939	517,256

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.9	11.1	12.2
NSE VIX	12.2	11.2	11.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	22,583	(0.3) %	4.8 %	Energy	11,559	(1.2) %	(2.2) %
IT	10,510	0.1 %	(0.8) %	Pharma	9,648	(3.1) %	(8.1) %
Metals	2,914	(0.4) %	(6.2) %	Finance	9,158	(0.4) %	3.8 %
Auto	10,381	0.4 %	4.6 %	PSU	3,548	(1.8) %	0.6 %
FMCG	25,002	(0.9) %	5.8 %	Real Estate	253	(2.7) %	15.7 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Maruti Suz	6,879	2.6 %	13.3 %	Adani Port	332	(6.4) %	(3.1) %
M & M	1,332	2.0 %	3.5 %	Aurobindo	542	(5.8) %	(20.7) %
Container	1,221	1.7 %	20.7 %	Havells In	450	(5.5) %	(4.0) %
Eicher Mot	27,598	1.5 %	8.0 %	Cipla	533	(5.3) %	(10.0) %
Wipro	526	1.0 %	3.8 %	Sun Pharma	614	(4.1) %	(11.3) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Construction Work Done (1Q)	24-05-2017	1:30	AUD	-	(0.002)
Skilled Vacancies (MoM) (APR)	24-05-2017	1:00	AUD	-	(0.006)
Westpac Leading Index (MoM) (APR)	24-05-2017	0:30	AUD	-	0.001
Bank of Canada Rate Decision (24 MAY)	24-05-2017	14:00	CAD	-	0.005
Industrial Production (YoY) (1Q)	24-05-2017	7:15	CHF	-	(0.012)
Industry & Construction Output WDA (YoY) (1Q)	24-05-2017	7:15	CHF	-	(0.008)
ECB Executive Board member Praet speaks in Sofia	24-05-2017	8:30	EUR	-	-
ECB President Draghi speaks in Madrid	24-05-2017	12:45	EUR	-	-
German GfK Consumer Confidence Survey (JUN)	24-05-2017	6:00	EUR	-	10.2
BOJ Kuroda speaks in Tokyo	24-05-2017	0:00	JPY	-	-
Foreign Buying Japan Bonds (Yen) (19 MAY)	24-05-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (19 MAY)	24-05-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (19 MAY)	24-05-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (19 MAY)	24-05-2017	23:50	JPY	-	-
Nikkei Japan PMI Mfg (MAY P)	24-05-2017	0:30	JPY	-	52.7
DOE Cushing OK Crude Inventory (19 MAY)	24-05-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (19 MAY)	24-05-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (19 MAY)	24-05-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (19 MAY)	24-05-2017	14:30	USD	-	-
Existing Home Sales (APR)	24-05-2017	14:00	USD	-	-
Existing Home Sales (MoM) (APR)	24-05-2017	14:00	USD	-	0.044
Fed's Kaplan Speaks in Toronto	24-05-2017	22:00	USD	-	-
Fed's Kashkari Speaks in Wisconsin	24-05-2017	22:30	USD	-	-
FOMC Meeting Minutes (3 MAY)	24-05-2017	18:00	USD	-	-
House Price Index (MoM) (MAR)	24-05-2017	13:00	USD	-	0.008
House Price Purchase Index (QoQ) (1Q)	24-05-2017	13:00	USD	-	0.015
MBA Mortgage Applications (19 MAY)	24-05-2017	11:00	USD	-	(0.041)
U.S. to Sell USD13 Bln 2-Year Floating Rate Notes Reopening	24-05-2017	15:30	USD	-	-
U.S. to Sell USD24 Bln 5-Year Notes	24-05-2017	17:00	USD	-	-



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