



24 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,853	0.9 %	6.7 %
BSE SENSEX	31,568	0.9 %	5.5 %
CNX BANK	24,317	1.4 %	12.9 %
CNX MIDCAP	17,857	1.2 %	3.0 %
CNX SMALLCAP	7,468	1.4 %	5.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,812	(0.4) %	9.7 %
S&P 500	2,444	(0.4) %	8.2 %
FTSE 100	7,383	0.0 %	2.9 %
HANG SENG	27,402	0.9 %	23.7 %
NIKKEI	19,435	0.3 %	(0.8) %
SHANGHAI COMPOSITE	3,288	(0.1) %	4.8 %

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: New home sales in the US unexpectedly saw a substantial decrease in the month of July, according to a report released by the Commerce Department on Wednesday. The report said new home sales plunged by 9.4% to an annual rate of 571,000 in July from the revised June rate of 630,000. Eurozone private sector retained its solid growth momentum in August, led by manufacturing that expanded at the fastest pace in over six years on the back of strong demand for exports. The flash Composite Output Index of the Purchasing Managers' survey climbed to a two-month high of 55.8 from July's 55.7, study results from IHS Markit showed.

Global Equities: US stocks slipped after gaining impressively in the previous session. US President Donald Trump pledged to a crowd of supporters that he would build the controversial wall on the border with Mexico even if it meant shutting down the government.

Indian Economy: The cost of demonetisation has been paid in last eight months but benefits will be felt over the long term, former Reserve Bank of India (RBI) governor D Subbarao said on Wednesday. Everybody agrees upon the costs of demonetisation. These were for the short term, while the benefits will be felt in the long term, Subbarao stated at the second foundation anniversary of Bandhan Bank. In the last eight months, the costs of demonetisation had been paid, he said.

Equity Markets: Market registered impressive gains on renewed hopes of US tax reform by the Trump administration. The key benchmark indices rose for the second straight session. Gains in banking shares propelled key indices higher. Realty stocks advanced. DLF rose after the company said that a meeting of the audit committee is scheduled to be held on 25 August 2017 to consider and review the status of the proposed sale of cumulative, compulsory, convertible preference shares (CCPS) held by CCPS holders to a GIC affiliate including the key terms and conditions and make appropriate recommendations to the board.

Corporate News: The Union Cabinet on Wednesday approved an alternative mechanism to oversee proposals of amalgamation of public sector banks. The proposals received from banks for in-principle approval to formulate schemes of amalgamation shall be placed before the Alternative Mechanism (AM), said Finance Minister Arun Jaitley. Indus Towers will spend Rs 350 crore this financial year to convert its diesel-run sites to green energy as the country's largest telecom tower provider braces for a short-term disruption due to consolidation in the Indian industry.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(113.5)	(133.9)	3.1
MF(INR cr)	(38.4)	554.3	480.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,923	30,387	30,346
F&O(INR cr)	715,861	663,076	567,092

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.4	12.2	11.3
NSE VIX	13.2	13.4	11.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,317	1.4 %	12.9 %	Energy	12,976	1.0 %	9.8 %
IT	10,478	0.3 %	(1.1) %	Pharma	8,616	0.6 %	(18.0) %
Metals	3,398	1.7 %	9.4 %	Finance	10,057	1.5 %	13.9 %
Auto	10,553	0.7 %	6.4 %	PSU	3,300	2.1 %	(6.4) %
FMCG	25,596	(0.0) %	8.3 %	Real Estate	275	3.4 %	25.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
DLF	186	6.1 %	26.6 %	Tech Mahin	430	(2.1) %	(5.1) %
Bajaj Fin.	1,779	5.7 %	50.6 %	Cummins In	881	(2.0) %	(8.4) %
Indiabulls	1,222	3.9 %	22.7 %	Tata Power	79	(1.6) %	(11.7) %
LIC Housin	660	3.7 %	5.6 %	Container	1,258	(1.4) %	24.4 %
Punjab Nat	143	3.4 %	(4.9) %	Emami	1,088	(1.4) %	3.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Industrial Production (YoY) (2Q)	24-08-2017	07:15	CHF	-	(0.013)
Industry & Construction Output WDA (YoY) (2Q)	24-08-2017	07:15	CHF	-	(0.013)
BBA Loans for House Purchase (JUL)	24-08-2017	08:30	GBP	-	40200
CBI Retailing Reported Sales (AUG)	24-08-2017	10:00	GBP	-	22
CBI Total Dist. Reported Sales (AUG)	24-08-2017	10:00	GBP	-	21
Exports (2Q P)	24-08-2017	08:30	GBP	-	(0.007)
Government Spending (2Q P)	24-08-2017	08:30	GBP	-	0.007
Gross Domestic Product (QoQ) (2Q P)	24-08-2017	08:30	GBP	-	0.003
Gross Domestic Product (YoY) (2Q P)	24-08-2017	08:30	GBP	-	0.017
Gross Fixed Capital Formation (2Q P)	24-08-2017	08:30	GBP	-	0.01
Imports (2Q P)	24-08-2017	08:30	GBP	-	0.017
Index of Services (3Mo3M) (JUN)	24-08-2017	08:30	GBP	-	0.004
Index of Services (MoM) (JUN)	24-08-2017	08:30	GBP	-	0.002
Private Consumption (2Q P)	24-08-2017	08:30	GBP	-	0.004
Total Business Investment (QoQ) (2Q P)	24-08-2017	08:30	GBP	-	0.006
Total Business Investment (YoY) (2Q P)	24-08-2017	08:30	GBP	-	0.007
Coincident Index (JUN F)	24-08-2017	05:00	JPY	-	117.2
Corporate Service Price (YoY) (JUL)	24-08-2017	23:50	JPY	-	0.008
Leading Index (JUN F)	24-08-2017	05:00	JPY	-	106.3
National Consumer Price Index (YoY) (JUL)	24-08-2017	23:30	JPY	-	0.004
National Consumer Price Index Ex-Fresh Food (YoY) (JUL)	24-08-2017	23:30	JPY	-	0.004
Natl CPI Ex Fresh Food, Energy (YoY) (JUL)	24-08-2017	23:30	JPY	-	0
Tokyo Consumer Price Index (YoY) (AUG)	24-08-2017	23:30	JPY	-	0.001
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (AUG)	24-08-2017	23:30	JPY	-	0.002
Tokyo CPI Ex-Fresh Food, Energy (YoY) (AUG)	24-08-2017	23:30	JPY	-	(0.001)
Central Bank Monetary Policy Minutes	24-08-2017	14:00	MXN	-	-
Continuing Claims (AUG 12)	24-08-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (AUG 18)	24-08-2017	14:30	USD	-	53
EIA Working Natural Gas Inventory (AUG 18)	24-08-2017	14:30	USD	-	52



Existing Home Sales (JUL)	24-08-2017	14:00	USD	-	-
Existing Home Sales (MoM) (JUL)	24-08-2017	14:00	USD	-	(0.018)
Initial Jobless Claims (AUG 19)	24-08-2017	12:30	USD	-	-
Kansas City Fed Manf. Activity (AUG)	24-08-2017	15:00	USD	-	10
U.S. to Sell USD14 Bln 5-Year TIPS Reopening	24-08-2017	17:00	USD	-	-

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