



24 Oct.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,185	0.4 %	10.3 %
BSE SENSEX	32,507	0.4 %	8.7 %
CNX BANK	24,089	0.3 %	11.8 %
CNX MIDCAP	18,845	0.3 %	8.7 %
CNX SMALLCAP	8,082	0.2 %	14.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,274	(0.2) %	17.1 %
S&P 500	2,565	(0.4) %	13.6 %
FTSE 100	7,524	0.0 %	4.8 %
HANG SENG	28,306	(0.6) %	27.8 %
NIKKEI	21,697	1.1 %	10.7 %
SHANGHAI COMPOSITE	3,381	0.1 %	7.8 %

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: Home prices increased in fewer Chinese cities in September, figures from the National Bureau of Statistics showed. House prices increased in 44 out of 70 cities surveyed by the government in September. In August, house prices had climbed in 46 cities. At the same time, prices declined in 18 cities and held unchanged in 8 cities. On a yearly basis, house prices increased in 67 cities and declined in 3 cities. Japan's leading index improved more than initially estimated in August, latest figures from the Cabinet Office showed Monday. The leading index, which measures the future economic activity, edged up to 107.2 in August from 105.2 in July. The reading for August was also revised higher from 106.8. UK firms reported slower growth in factory orders in October, the Industrial Trends Survey from the Confederation of British Industry showed. The order book balance fell to -2% in October, the lowest since November, from +7% in September.

Global Equities: European stocks stayed elevated as investors monitored fresh corporate earnings and awaited further developments of Spain's ongoing constitutional crisis.

Indian Economy: Demonetisation and the recently introduced Goods and Service Tax (GST), may impact the business of upcoming wedding season, starting November, by 10-15 per cent, industry chamber Assocham said on Monday. Wedding services like marriage garden/marriage hall booking, tent booking, confectionery services and photography are expected to get impacted. At present the Indian wedding industry is about Rs 1 trillion and is growing at 25 to 30% annually.

Equity Markets: Trading for the week started on a positive note as key benchmark indices settled with modest gains after what was a rangebound trading session. Firmness in global stocks supported gains on the domestic bourses. Market opened with small gains tracking firm Asian stocks and soon extended gains and hit fresh intraday high in early trade.

Corporate News: Infosys would be in focus. India's second largest software services provider, will announce its July-September quarter earnings on Tuesday after market hours. Reliance Industries could extend gains after share price hit a fresh record high of Rs 943.45 yesterday following hike in tariff rates for its Jio plan. The share price has gained nearly 75 percent during the current calendar year and over 20 percent in October. Reliance Jio, on October 18, increased tariff for its popular 84-day plan by 15% to Rs 459, under which subscribers get 1GB 4G data at high speed per day. Indiabulls Housing Finance Ltd reported a 26% spurt in second quarter consolidated net profit at Rs 861 crore against Rs 684 crore in the year ago period. The company's board of directors declared an interim dividend of Rs 9 per share on equity shares of Rs 2 each. In the reporting quarter, net interest income increased by 27% year-on-year (yoy) at Rs 1,389 crore. Some rejig in Goods and Services Tax (GST) rate structure is required to reduce the burden on small and medium businesses, revenue secretary Hasmukh Adhia has reportedly said. The GST, which amalgamates more than a dozen central and state levies like excise duty, service tax and VAT, will take about a year to stabilize, he reportedly said.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(172.2)	(71.7)	(17.3)
MF(INR cr)	946.8	583.0	617.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,086	29,505	30,566
F&O(INR cr)	699,742	620,566	593,763

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.0	9.8	11.0
NSE VIX	12.3	11.6	11.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,089	0.3 %	11.8 %	Energy	14,231	1.8 %	20.4 %
IT	10,998	1.0 %	3.8 %	Pharma	9,542	(0.5) %	(9.2) %
Metals	3,843	0.6 %	23.7 %	Finance	9,929	(0.1) %	12.5 %
Auto	11,110	0.0 %	12.0 %	PSU	2,980	1.3 %	(15.5) %
FMCG	25,419	(0.6) %	7.5 %	Real Estate	290	0.9 %	32.3 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Idea Cellu	98	7.6 %	15.3 %	Avenue Sup	1,126	(3.5) %	77.6 %
Shree Ceme	19,247	5.7 %	12.1 %	Tata Motor	234	(3.0) %	(16.7) %
Bharti Air	497	5.0 %	45.5 %	Cipla	593	(2.5) %	0.0 %
UltraTech	4,205	4.2 %	4.4 %	Bharti Inf	449	(2.4) %	36.2 %
Petronet L	273	3.7 %	32.0 %	Axis Bank	450	(2.2) %	(10.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
ECB Bank Lending Survey	24-10-2017	8:00	EUR	-	-
Euro Area Second Quarter Government Debt	24-10-2017	9:00	EUR	-	-
Euro Area Second Quarter Government Deficit	24-10-2017	9:00	EUR	-	-
Markit Eurozone Composite PMI (OCT P)	24-10-2017	8:00	EUR	-	56.7
Markit Eurozone Manufacturing PMI (OCT P)	24-10-2017	8:00	EUR	-	58.1
Markit Eurozone Services PMI (OCT P)	24-10-2017	8:00	EUR	-	55.8
Markit France Composite PMI (OCT P)	24-10-2017	7:00	EUR	-	57.1
Markit France Manufacturing PMI (OCT P)	24-10-2017	7:00	EUR	-	56.1
Markit France Services PMI (OCT P)	24-10-2017	7:00	EUR	-	57
Markit Germany Services PMI (OCT P)	24-10-2017	7:30	EUR	-	55.6
Markit/BME Germany Composite PMI (OCT P)	24-10-2017	7:30	EUR	-	57.7
Markit/BME Germany Manufacturing PMI (OCT P)	24-10-2017	7:30	EUR	-	60.6
Nikkei Japan PMI Mfg (OCT P)	24-10-2017	0:30	JPY	-	52.9
Supermarket Sales (YoY) (SEP)	24-10-2017	5:00	JPY	-	(0.005)
Markit US Composite PMI (OCT P)	24-10-2017	13:45	USD	-	54.8
Markit US Manufacturing PMI (OCT P)	24-10-2017	13:45	USD	-	53.1
Markit US Services PMI (OCT P)	24-10-2017	13:45	USD	-	55.3
Richmond Fed Manufacturing Index (OCT)	24-10-2017	14:00	USD	-	19
U.S. to Sell 4-Week Bills	24-10-2017	15:30	USD	-	-
U.S. to Sell USD26 Bln 2-Year Notes	24-10-2017	17:00	USD	-	-

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