



25 Sep.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,899	(0.7) %	7.2 %
BSE SENSEX	31,922	(1.4) %	5.9 %
CNX BANK	24,137	(0.9) %	12.0 %
CNX MIDCAP	18,097	(1.6) %	4.4 %
CNX SMALLCAP	7,524	(2.4) %	6.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,350	(0.0) %	12.4 %
S&P 500	2,502	0.1 %	10.8 %
FTSE 100	7,311	0.6 %	1.8 %
HANG SENG	27,881	(0.8) %	25.9 %
NIKKEI	20,296	(0.3) %	3.6 %
SHANGHAI COMPOSITE	3,353	(0.2) %	6.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.80	0.0 %	(3.9) %
EUR/USD	1.20	0.0 %	12.7 %
GBP/USD	1.35	(0.6) %	9.8 %
USD/JPY	111.99	(0.1) %	(3.4) %
USD/AUD	1.26	(0.6) %	(8.2) %
USD/SGD	1.35	(0.3) %	(5.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	0.2 %	(3.2) %
Gold(INR/10g)	29,551	(0.1) %	6.3 %
Gold Comex(USD/oz)	1,300	(0.0) %	12.3 %
SILVER(INR/1Kg)	39,210	(0.2) %	0.7 %
Aluminium(USD/MT)	2,137	(0.8) %	25.6 %
Copper(USD/MT)	6,405	(0.0) %	14.9 %

**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:** Eurozone's private sector expanded at the fastest pace in four months in September signaling that the economy ended the third quarter on a strong note. The headline composite output index rose unexpectedly to 56.7 in September from 55.7 in August, flash data from IHS Markit showed Friday. The services Purchasing Managers' Index rose to 55.6 from 54.7 in August. At the same time, the factory PMI edged up to 58.2 from 57.4 a month ago. UK manufacturers' order books softened in September but both total orders and export orders remained strong, the Confederation of British Industry said. According to the latest monthly Industrial Trends Survey, a net balance of 7% of manufacturers said order books were above normal but it was below August's 13%. The balance of manufacturers reporting a rise in export orders came in at 10% compared to 11% in August.

**Global Equities:** US stocks witnessed choppy moves. Markets eyed global concerns amid an escalating war of words between North Korean leader Kim Jong Un and President Donald Trump.

**Indian Economy:** To get 6.5% growth for the year as a whole, the economy needs to grow at 7% in the next three quarters; probably rate of growth will be around 6.5%, said C. Rangarajan, Former Chairman-Economic Advisory Council to the Prime Minister of India & Former Governor, RBI at an ASSOCHAM event. On the second quarter GDP growth, Rangarajan said, Some of the reasons for slowdown are temporary or transient factors like introduction of GST or perhaps even demonetisation. Therefore, the fourth quarter and the first quarter have been more or less same-5.6% and 5.7%, he noted.

**Equity Markets:** Market registered strong losses in the last trading session of the week amid geopolitical tensions. The Sensex settled below the 32,000 mark while the Nifty skidded below the crucial 10,000 level. Bank stocks declined. Metal and mining stocks slumped amid fall in global metal prices after S&P Global Ratings cut China's sovereign credit rating for the first time since 1999.

**Corporate News:** Maruti Suzuki India's compact sedan Dzire, became the best-selling model in the country for the first time in August, taking the pole position from its the hugely popular Alto. The new Dzire, which was launched in May this year, recorded sales of 26,140 units in August ahead of 21,521 units sold for Alto. GlaxoSmithKline Pharmaceuticals said its board approved sale of 60 acre land in Thane to Oberoi Realty for Rs 555 crore. Capacit'e Infraprojects debuts on the secondary equity market today, 25 September 2017. The company had priced the initial public offer (IPO) at the top end of the Rs 245 to Rs 250 per share price band. The IPO opened on 13 September 2017 and closed on 15 September 2017. It received bids for 209.17 crore shares. The IPO was subscribed 183.03 times. Departmental store chain Shoppers Stop said its board approved a proposal to sell 5% equity in the company for Rs 179.25 crore to Amazon NV Holdings LLC, the investment arm of the world's largest online retailer Amazon Inc. Amazon.com NV Investment Holdings, a foreign portfolio investor, will subscribe to about 43.95 lakh shares in Shoppers Stop at Rs 407.78 each on a preferential basis.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(162.6)	(61.6)	(6.3)
MF(INR cr)	730.0	549.6	572.4

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	34,014	30,560	30,333
F&O(INR cr)	699,711	563,718	577,483

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	9.6	10.6	11.2
NSE VIX	12.8	12.2	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	24,369	(1.7) %	13.1 %	Energy	13,047	(2.2) %	10.4 %
IT	10,632	(0.2) %	0.4 %	Pharma	9,465	(1.7) %	(9.9) %
Metals	3,492	(4.0) %	12.4 %	Finance	10,065	(1.5) %	14.0 %
Auto	10,927	(1.1) %	10.1 %	PSU	3,153	(2.8) %	(10.6) %
FMCG	25,220	(1.1) %	6.7 %	Real Estate	273	(4.3) %	24.6 %

### 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>
HCL Techno	884	1.6 %	2.1 %	DLF	174	(6.2) %	18.1 %
Wipro	294	0.9 %	16.1 %	Torrent Ph	1,262	(6.1) %	(16.2) %
United Bre	809	0.7 %	5.8 %	Shriram Tr	1,001	(6.1) %	(9.3) %
Bharti Inf	390	0.6 %	18.3 %	Hindalco I	231	(5.6) %	19.3 %
Oil India	329	0.1 %	(0.5) %	S A I L	58	(5.2) %	(8.2) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

..... End of Report .....