



25 Oct.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,208	0.2 %	10.5 %
BSE SENSEX	32,607	0.3 %	9.0 %
CNX BANK	24,222	0.6 %	12.4 %
CNX MIDCAP	18,908	0.3 %	9.1 %
CNX SMALLCAP	8,177	1.2 %	15.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,442	0.7 %	17.9 %
S&P 500	2,569	0.2 %	13.8 %
FTSE 100	7,527	0.0 %	4.9 %
HANG SENG	28,155	(0.5) %	27.1 %
NIKKEI	21,805	0.5 %	11.3 %
SHANGHAI COMPOSITE	3,388	0.2 %	8.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.07	0.0 %	(3.5) %
EUR/USD	1.18	(0.4) %	10.9 %
GBP/USD	1.31	(0.6) %	6.8 %
USD/JPY	113.89	0.9 %	(1.8) %
USD/AUD	1.29	1.7 %	(5.4) %
USD/SGD	1.36	0.4 %	(4.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	0.8 %	(0.8) %
Gold(INR/10g)	29,611	0.0 %	6.5 %
Gold Comex(USD/oz)	1,284	0.2 %	11.0 %
SILVER(INR/1Kg)	39,267	0.0 %	0.9 %
Aluminium(USD/MT)	2,134	(1.2) %	25.4 %
Copper(USD/MT)	6,959	(0.7) %	24.8 %

**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	(0.0) %	(0.1) %

**Global Economy:** The latest survey of IHS Markit indicates towards improved operating conditions throughout the US manufacturing sector. The seasonally adjusted flash U.S. Manufacturing PMI index rose to 54.5 in October from September's reading of 53.1. This signals the most solid upturn in manufacturing growth since January. The euro area composite output index fell more-than-expected to 55.9 in October from 56.7 a month ago, flash survey data from IHS Markit showed Tuesday. The score was forecast to drop marginally to 56.5. Private sector expanded strongly in October but the pace of growth slowed from September. The services Purchasing Managers' Index came in at 54.9 in October, down from 55.8 in the previous month. Meanwhile, the factory PMI rose unexpectedly to an 80-month high of 58.6 from 58.1 in September.

**Global Equities:** US stocks hit another record high. European stocks extended gains on continued buying. Asian markets saw a mixed outing as investors watched earnings.

**Indian Economy:** The total revenue of GST paid under different heads (upto 23rd October, 2017) for the month of September 2017 is Rs. 92,150/- crore. The total CGST revenue is Rs. 14,042 crore, SGST revenue is Rs. 21,172 crore, IGST revenue is Rs. 48,948 crore (of which IGST from imports in September 2017 is Rs. 23,951 crore) and Compensation Cess is Rs. 7,988/- crore (of which Rs. 722 crore is Compensation Cess from imports in September 2017). The total number of GSTR 3B returns filed for the month of September 2017 is 42.91 lakhs (as on 23.10.2017). The last date for payment of GST as well as filing of GSTR 3B return for the month of September 2017 was 20th October, 2017. The Goods and Services Tax (GST) was introduced on 1st of July, 2017. Waiver of late fee on filing of GSTR-3B for August and September, 2017.

**Equity Markets:** Key benchmark indices settled with modest gains as firmness in most global stocks supported gains on the domestic bourses. Market gained for the second day in a row. Stocks of public sector banks rallied on hopes of early recapitalisation of banks. HDFC Bank nudged higher after reporting decent Q2 results. Asian Paints surged after decent Q2 earnings. Zee Entertainment Enterprises jumped after strong quarterly earnings.

**Corporate News:** The Government has announced a heavy PSU banks recapitalisation program of Rs 2.11 lakh crore. Of this, Rs 1.35 lakh crore will come from recap bonds, while the rest will come from the market and budgetary support. IT major Infosys's consolidated net profit rose 7% to Rs 3726 crore on 2.9% growth in revenue to Rs 17567 crore in Q2 September 2017 over Q1 June 2017. The results are as per International Financial Reporting Standards (IFRS). HDFC Bank's net profit rose 20.13% to Rs 4151.03 crore on 16.55% growth in total income to Rs 23276.18 crore in Q2 September 2017 over Q2 September 2016. The bank's gross non-performing assets (NPAs) stood at Rs 7702.84 crore as on 30 September 2017 as against Rs 7242.93 crore as on 30 June 2017 and Rs 5069.04 crore as on 30 September 2016. The ratio of net NPAs to net advances stood at 0.43% as on 30 September 2017 as against 0.44% as on 30 June 2017 and 0.3% as on 30 September 2016. Drug maker Panacea Biotec said it has received final approval from the US health regulator to launch generic Prasugrel tablets, used for preventing blood clots in people with acute coronary syndrome, in the American market.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	51.3	(62.3)	(16.8)
MF(INR cr)	946.8	583.0	617.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,464	29,769	30,587
F&O(INR cr)	707,852	626,385	594,583

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.1	9.9	11.0
NSE VIX	11.6	11.6	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,222	0.6 %	12.4 %	Energy	14,291	0.4 %	20.9 %
IT	10,885	(1.0) %	2.8 %	Pharma	9,490	(0.5) %	(9.7) %
Metals	3,858	0.4 %	24.2 %	Finance	9,978	0.5 %	13.1 %
Auto	11,080	(0.3) %	11.7 %	PSU	3,093	3.8 %	(12.3) %
FMCG	25,503	0.3 %	7.9 %	Real Estate	292	0.6 %	33.1 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	526	7.0 %	(0.5) %	Havells In	503	(7.0) %	7.4 %
Punjab Nat	138	5.5 %	(7.8) %	Avenue Sup	1,093	(3.0) %	72.3 %
Asian Pain	1,223	4.2 %	12.2 %	LIC Housin	634	(2.6) %	1.4 %
S A I L	62	4.1 %	(2.4) %	HCL Techno	915	(2.4) %	5.6 %
Bank of Ba	143	3.8 %	(17.0) %	Shree Ceme	18,842	(2.1) %	9.7 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Prices Index (QoQ) (3Q)	25-10-2017	0:30	AUD	-	0.002
Consumer Prices Index (YoY) (3Q)	25-10-2017	0:30	AUD	-	0.019
Consumer Prices Index RBA Trimmed Mean (QoQ) (3Q)	25-10-2017	0:30	AUD	-	0.005
Consumer Prices Index RBA Trimmed Mean (YoY) (3Q)	25-10-2017	0:30	AUD	-	0.018
Consumer Prices Index RBA Weighted Median (QoQ) (3Q)	25-10-2017	0:30	AUD	-	0.005
Consumer Prices Index RBA Weighted Median (YoY) (3Q)	25-10-2017	0:30	AUD	-	0.018
Skilled Vacancies (MoM) (SEP)	25-10-2017	0:00	AUD	-	0.003
Bank of Canada Rate Decision (OCT 25)	25-10-2017	14:00	CAD	-	0.01
Bank of Canada Releases October Monetary Policy Report	25-10-2017	14:00	CAD	-	-
BOC's Poloz and Wilkins Hold Press Conference in Ottawa	25-10-2017	15:15	CAD	-	-
Credit Suisse Survey Expectations (OCT)	25-10-2017	8:00	CHF	-	28
UBS Consumption Indicator (SEP)	25-10-2017	6:00	CHF	-	1.53
German IFO - Business Climate (OCT)	25-10-2017	8:00	EUR	-	115.2
German IFO - Current Assessment (OCT)	25-10-2017	8:00	EUR	-	123.6
German IFO - Expectations (OCT)	25-10-2017	8:00	EUR	-	107.4
BBA Loans for House Purchase (SEP)	25-10-2017	8:30	GBP	-	41807
Gross Domestic Product (QoQ) (3Q A)	25-10-2017	8:30	GBP	-	0.003
Gross Domestic Product (YoY) (3Q A)	25-10-2017	8:30	GBP	-	0.015
Index of Services (3Mo3M) (AUG)	25-10-2017	8:30	GBP	-	0.005
Index of Services (MoM) (AUG)	25-10-2017	8:30	GBP	-	(0.002)
BOJ Outright Bond Purchase 1~3 Years	25-10-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	25-10-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	25-10-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	25-10-2017	1:10	JPY	-	-
Corporate Service Price (YoY) (SEP)	25-10-2017	23:50	JPY	-	0.008
Foreign Buying Japan Bonds (Yen) (OCT 20)	25-10-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (OCT 20)	25-10-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (OCT 20)	25-10-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (OCT 20)	25-10-2017	23:50	JPY	-	-



Balance (YTD) (New Zealand dollars) (SEP)	25-10-2017	21:45	NZD	-	-
Exports (New Zealand dollars) (SEP)	25-10-2017	21:45	NZD	-	-
Imports (New Zealand dollars) (SEP)	25-10-2017	21:45	NZD	-	-
Trade Balance (New Zealand dollars) (SEP)	25-10-2017	21:45	NZD	-	-
Cap Goods Orders Nondef Ex Air (SEP P)	25-10-2017	12:30	USD	-	0.011
Cap Goods Ship Nondef Ex Air (SEP P)	25-10-2017	12:30	USD	-	0.011
DOE Cushing OK Crude Inventory (OCT 20)	25-10-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (OCT 20)	25-10-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (OCT 20)	25-10-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (OCT 20)	25-10-2017	14:30	USD	-	-
Durable Goods Orders (SEP P)	25-10-2017	12:30	USD	-	0.02
Durables Ex Transportation (SEP P)	25-10-2017	12:30	USD	-	0.005
House Price Index (MoM) (AUG)	25-10-2017	13:00	USD	-	0.002
MBA Mortgage Applications (OCT 20)	25-10-2017	11:00	USD	-	0.036
New Home Sales (MoM) (SEP)	25-10-2017	14:00	USD	-	(0.034)
New Home Sales (SEP)	25-10-2017	14:00	USD	-	-
U.S. to Sell USD15 Bln 2-Year Floating Rate Notes	25-10-2017	15:30	USD	-	-
U.S. to Sell USD34 Bln 5-Year Notes	25-10-2017	17:00	USD	-	-

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