



26 May.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,508	(0.0) %	2.9 %
BSE SENSEX	30,750	1.5 %	2.9 %
CNX BANK	23,151	(0.2) %	7.4 %
CNX MIDCAP	17,381	0.2 %	0.3 %
CNX SMALLCAP	7,161	0.3 %	1.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,083	0.3 %	6.0 %
S&P 500	2,415	0.4 %	7.0 %
FTSE 100	7,518	0.0 %	4.7 %
HANG SENG	25,631	0.8 %	15.7 %
NIKKEI	19,813	0.4 %	1.1 %
SHANGHAI COMPOSITE	3,108	1.4 %	(0.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.62	(0.4) %	(4.2) %
EUR/USD	1.12	0.1 %	5.6 %
GBP/USD	1.29	(0.7) %	4.7 %
USD/JPY	111.57	(0.2) %	(3.8) %
USD/AUD	1.35	0.5 %	(1.6) %
USD/SGD	1.39	(0.3) %	(3.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(4.8) %	(6.6) %
Gold(INR/10g)	28,702	0.0 %	3.2 %
Gold Comex(USD/oz)	1,261	(0.1) %	9.0 %
SILVER(INR/1Kg)	39,453	0.0 %	1.4 %
Aluminium(USD/MT)	1,954	0.5 %	14.8 %
Copper(USD/MT)	5,665	0.0 %	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 Labor Department on Thursday showed a slight uptick in first-time claims for US unemployment benefits in the week ended May 20th. The report said initial jobless claims inched up to 234,000, an increase of 1,000 from the previous week's revised level of 233,000. UK's economic growth eased more than previously estimated in the first quarter due to the downward revisions to services and production. Gross domestic product grew 0.2% sequentially in the first quarter instead of 0.3% estimated on April 28, the second estimates from the Office for National Statistics showed Thursday.

Global Equities: US stocks rose on Thursday, extending their recent winning streak to six sessions. With the continued upward move, the Nasdaq and the S&P 500 reached new record closing highs.

Indian Economy: The financial regulators have to open up their space in a bigger way for developing a vibrant debt market in India in the next three years, a top Securities Exchange Board of India (SEBI) official said at an ASSOCHAM event. It must be seen whether regulators like IRDA (Insurance Regulatory and Development Authority), PFRDA (Pension Fund Regulatory and Development Authority) have created that kind of a bandwidth for the insurance companies, for the pension funds, provident funds to invest in the bond market, noted G. Mahalingam while addressing an ASSOCHAM National Conference on Bond Market.

Equity Markets: Upbeat global stocks provided momentum for domestic stocks in a session marked with high volatility. The Sensex hit record high on intraday as well as closing basis. The Nifty settled at its highest level in over one week. The market was volatile as traders rolled over positions in the futures & options (F&O) segment from the near month May 2017 series to June 2017 series.

Corporate News: Cipla reported consolidated net loss of Rs 61.79 crore in Q4 March 2017 compared with loss of Rs 92.83 crore in Q4 March 2016. Total income rose 6.84% to Rs 3604.79 crore in Q4 March 2017 over Q4 March 2016. The result was announced after market hours yesterday, 25 May 2017. ITC, Tech Mahindra and Sun Pharmaceutical Industries will announce Q4 results today, 26 May 2017. Tata Power Renewable Energy, a wholly owned subsidiary of Tata Power company has successfully issued Guaranteed, Unsecured, Non-Cumulative, Redeemable, Taxable, Listed, Rated Non-Convertible Debentures of Rs 500 crore on private placement basis. Infosys and HP Inc. yesterday, 25 May 2017 launched joint Retail Point of Sale (RPOS) and Enterprise Device as a Service (DaaS) solutions to help businesses accelerate digital transformation as part of the HP Global System Integrator (GSI) Alliance Program.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	55.3	90.3	32.4
MF(INR cr)	415.9	404.1	524.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	38,527	30,403	30,400
F&O(INR cr)	1,261,114	570,792	548,165

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.0	11.0	12.1
NSE VIX	10.5	11.2	11.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,191	2.9 %	7.6 %	Energy	11,628	0.7 %	(1.6) %
IT	10,738	2.2 %	1.4 %	Pharma	9,199	(2.6) %	(12.4) %
Metals	2,900	1.8 %	(6.6) %	Finance	9,349	2.2 %	5.9 %
Auto	10,588	1.9 %	6.7 %	PSU	3,559	2.6 %	0.9 %
FMCG	25,057	0.3 %	6.0 %	Real Estate	255	2.1 %	16.2 %

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>
Larsen & T	1,769	5.0 %	6.5 %	Lupin	1,140	(7.2) %	(20.5) %
Ashok Leyl	86	4.6 %	2.4 %	Dr Reddy's	2,428	(3.5) %	(11.5) %
Havells In	460	4.4 %	(1.8) %	Power Fin.	142	(3.2) %	(4.2) %
Vedanta	233	3.9 %	(14.7) %	Glenmark P	612	(3.2) %	(28.7) %
ICICI Bank	318	3.6 %	10.8 %	Cadila Hea	427	(3.2) %	(3.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA's Richards Panel Participation	26-05-2017	4:30	AUD	-	-
Baker Hughes U.S. Rig Count (26 MAY)	26-05-2017	17:00	USD	-	901
Cap Goods Orders Nondef Ex Air (APR P)	26-05-2017	12:30	USD	-	0.005
Cap Goods Ship Nondef Ex Air (APR P)	26-05-2017	12:30	USD	-	0.005
Core Personal Consumption Expenditure (QoQ) (1Q S)	26-05-2017	12:30	USD	-	0.02
Durable Goods Orders (APR P)	26-05-2017	12:30	USD	-	0.009
Durables Ex Transportation (APR P)	26-05-2017	12:30	USD	-	0
Fed's Bullard Speaks on U.S. economy in Tokyo	26-05-2017	2:00	USD	-	-
Gross Domestic Product (Annualized) (1Q S)	26-05-2017	12:30	USD	-	0.007
Gross Domestic Product Price Index (1Q S)	26-05-2017	12:30	USD	-	0.023
Personal Consumption (1Q S)	26-05-2017	12:30	USD	-	0.003
U. of Mich. 1 Yr Inflation (MAY F)	26-05-2017	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (MAY F)	26-05-2017	14:00	USD	-	0.023
U. of Mich. Current Conditions (MAY F)	26-05-2017	14:00	USD	-	112.7
U. of Mich. Expectations (MAY F)	26-05-2017	14:00	USD	-	88.1
U. of Michigan Confidence (MAY F)	26-05-2017	14:00	USD	-	97.7

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