



26 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,973	0.1 %	8.0 %
BSE SENSEX	32,228	(0.1) %	7.9 %
CNX BANK	24,510	(0.0) %	13.7 %
CNX MIDCAP	18,400	0.1 %	6.2 %
CNX SMALLCAP	7,826	0.3 %	10.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,613	0.5 %	8.7 %
S&P 500	2,477	0.3 %	9.7 %
FTSE 100	7,435	0.8 %	3.6 %
HANG SENG	26,852	0.0 %	21.2 %
NIKKEI	19,955	(0.1) %	1.8 %
SHANGHAI COMPOSITE	3,244	(0.2) %	3.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.38	0.1 %	(4.5) %
EUR/USD	1.16	(0.1) %	9.9 %
GBP/USD	1.30	0.2 %	5.9 %
USD/JPY	111.89	0.7 %	(3.5) %
USD/AUD	1.26	0.1 %	(7.5) %
USD/SGD	1.36	(0.0) %	(4.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	3.3 %	(8.5) %
Gold(INR/10g)	28,423	(0.4) %	2.2 %
Gold Comex(USD/oz)	1,253	(0.7) %	8.3 %
SILVER(INR/1Kg)	37,561	(1.0) %	(3.5) %
Aluminium(USD/MT)	1,897	0.3 %	11.4 %
Copper(USD/MT)	6,150	2.5 %	10.3 %

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	0.1 %	(0.1) %

Global Economy: Consumer confidence in the US unexpectedly improved in the month of July, according to a report released by the Conference Board on Tuesday. The Conference Board said its consumer confidence index climbed to 121.1 in July from a revised 117.3 in June. Consumers assessment of current conditions remained at a 16-year high and their expectations for the short-term outlook improved somewhat after cooling last month. The Conference Board said the Present Situation Index increased from 143.9 to 147.8, while the Expectations Index rose from 99.6 last month to 103.3. German business confidence strengthened further to a fresh record high in July as companies became more satisfied with their current situation amid the improving business outlook. The business confidence index rose to 116 in July from a revised 115.2 in June, survey data from the Ifo Institute showed Tuesday.

Global Equities: After showing a lack of direction early in the session, stocks moved mostly higher. With the upward move on the day, the Nasdaq and the S&P 500 reached new record closing highs.

Equity Markets: Key benchmark indices closed the session near the flat line. The barometer index, the S&P BSE Sensex, fell 17.60 points or 0.05% to settle at 32,228.27. The Nifty 50 index fell 1.85 points or 0.02% to settle at 9,964.55. Both the Sensex, and the Nifty, reversed trend after hitting record high in early trade. The Nifty closed the session below the historic 10,000 mark after crossing that mark in early trade. The market sentiment was dull amid lackluster trading in Asian bourses and subdued closing on Wall Street overnight.

Indian Economy: As per All India Cold Storage Capacity and Technology - Base line Survey (10 December 2014) conducted by M/s Hansa Research Group, commissioned by National Horticulture Board (NHB) under Department of Agriculture, Cooperation & Farmers Welfare, 75% of the total cold storage capacity in the country was used for the purpose of storage of horticulture crops including potato. Out of total production of potatoes in the country, 75% was stored in cold storages for long term storage at farm gate. Further, 95% of cold storages in the country were owned by private sector, 3% by cooperatives and remaining 2% were under Public Sector Undertakings.

Corporate News: Bharti Airtel's consolidated net profit fell 58.4% to Rs 617.70 crore on 14% decline in net sales to Rs 21958.10 crore in Q1 June 2017 over Q1 June 2016. Axis Bank's net profit fell 16.1% to Rs 1305.60 crore on 1.4% growth in total income to Rs 14052.30 crore in Q1 June 2017 over Q1 June 2016. Hero MotoCorp's net profit rose 3.5% to Rs 914.04 crore on 7.7% increase in net sales to Rs 7971.58 crore in Q1 June 2017 over Q1 June 2016. The company's EBITDA (earnings before interest, taxes, depreciation and amortization) rose 5.35% to Rs 1295.90 crore in Q1 June 2017 over Q1 June 2016. Cipla and the product development partnership Medicines for Malaria Venture (MMV) announced the launch of 100 mg Artesunate Rectocaps/Rectal Artesunate Suppositories (RAS), a life-saving, pre-referral intervention for the management of severe malaria in young children.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(41.9)	11.3	25.8
MF(INR cr)	1,038.1	390.0	466.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,741	32,181	30,064
F&O(INR cr)	527,501	548,788	539,779

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.4	10.4	11.2
NSE VIX	10.9	11.2	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,521	0.4 %	13.8 %	Energy	12,691	(0.4) %	7.4 %
IT	10,810	(0.1) %	2.1 %	Pharma	9,931	(0.5) %	(5.5) %
Metals	3,228	1.3 %	3.9 %	Finance	9,959	0.3 %	12.8 %
Auto	10,933	(0.3) %	10.2 %	PSU	3,590	0.7 %	1.8 %
FMCG	25,925	(0.4) %	9.7 %	Real Estate	281	0.4 %	28.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	98	6.4 %	14.8 %	Zee Entert	539	(2.4) %	1.9 %
Vedanta	274	3.6 %	0.6 %	Power Fin.	125	(2.3) %	(15.6) %
Shriram Tr	998	3.5 %	(9.6) %	Glaxosmi.	2,510	(2.3) %	(8.2) %
Indiabulls	1,198	3.5 %	20.3 %	Cummins In	1,005	(2.2) %	4.6 %
Hindalco I	220	2.7 %	13.7 %	UltraTech	4,106	(2.2) %	2.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Prices Index (QoQ) (2Q)	26-07-2017	1:30	AUD	-	0.005
Consumer Prices Index (YoY) (2Q)	26-07-2017	1:30	AUD	-	0.021
Consumer Prices Index RBA Trimmed Mean (QoQ) (2Q)	26-07-2017	1:30	AUD	-	0.005
Consumer Prices Index RBA Trimmed Mean (YoY) (2Q)	26-07-2017	1:30	AUD	-	0.019
Consumer Prices Index RBA Weighted Median (QoQ) (2Q)	26-07-2017	1:30	AUD	-	0.004
Consumer Prices Index RBA Weighted Median (YoY) (2Q)	26-07-2017	1:30	AUD	-	0.017
RBA's Lowe Speech in Sydney	26-07-2017	3:05	AUD	-	-
Skilled Vacancies (MoM) (Jun)	26-07-2017	1:00	AUD	-	0.012
Credit Suisse Survey Expectations (Jul)	26-07-2017	8:00	CHF	-	20.7
UBS Consumption Indicator (Jun)	26-07-2017	6:00	CHF	-	1.39
BBA Loans for House Purchase (Jun)	26-07-2017	8:30	GBP	-	40347
Gross Domestic Product (QoQ) (2Q A)	26-07-2017	8:30	GBP	-	0.002
Gross Domestic Product (YoY) (2Q A)	26-07-2017	8:30	GBP	-	0.02
Index of Services (3Mo3M) (May)	26-07-2017	8:30	GBP	-	0.002
Index of Services (MoM) (May)	26-07-2017	8:30	GBP	-	0.002
BOJ Nakaso speaks in Hiroshima	26-07-2017	1:30	JPY	-	-
Foreign Buying Japan Bonds (Yen) (Jul 21)	26-07-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (Jul 21)	26-07-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (Jul 21)	26-07-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (Jul 21)	26-07-2017	23:50	JPY	-	-
Small Business Confidence (Jul)	26-07-2017	5:00	JPY	-	49.2
DOE Cushing OK Crude Inventory (Jul 21)	26-07-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (Jul 21)	26-07-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (Jul 21)	26-07-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (Jul 21)	26-07-2017	14:30	USD	-	-
Federal Open Market Committee Rate Decision (Jul 26)	26-07-2017	18:00	USD	-	0.0125
FOMC Rate Decision (Lower Bound) (Jul 26)	26-07-2017	18:00	USD	-	0.01
MBA Mortgage Applications (Jul 21)	26-07-2017	11:00	USD	-	0.063
New Home Sales (Jun)	26-07-2017	14:00	USD	-	-



New Home Sales (MoM) (Jun)	26-07-2017	14:00	USD	-	0.029
U.S. to Sell USD15 Bln 2-Year Floating Rate Notes	26-07-2017	15:30	USD	-	-
U.S. to Sell USD34 Bln 5-Year Notes	26-07-2017	17:00	USD	-	-

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