



26 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,873	(0.9) %	6.9 %
BSE SENSEX	31,627	(0.9) %	5.7 %
CNX BANK	24,165	(0.8) %	12.1 %
CNX MIDCAP	18,151	(1.3) %	4.7 %
CNX SMALLCAP	7,528	(2.3) %	6.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,296	(0.2) %	12.1 %
S&P 500	2,497	(0.2) %	10.6 %
FTSE 100	7,301	(0.1) %	1.7 %
HANG SENG	27,500	(1.4) %	24.2 %
NIKKEI	20,398	0.5 %	4.1 %
SHANGHAI COMPOSITE	3,342	(0.3) %	6.6 %

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)	29,713	0.5 %	6.8 %
Gold Comex(USD/oz)	1,300	(0.0) %	12.3 %
SILVER(INR/1Kg)	39,391	0.5 %	1.2 %
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: German business sentiment dropped for the second straight month in September as companies were less satisfied with their current business situation and their short-term outlook, survey data from the Ifo Institute showed Monday. The business confidence index slipped to 115.2 in September, while it was expected to remain unchanged at 115.9 seen in August. Confidence in manufacturing and wholesaling declined in September, while sentiment among retailers and contractors improved from August.

Global Equities: Sentiments remained weary on continued global geopolitical concerns as the US announced new travel restrictions for visitors from eight countries.

Indian Economy: As per the First Advance Estimates, total production of Kharif Foodgrains during 2017-18 is estimated at 134.67 million tonnes. This is lower by 3.86 million tonnes as compared to last year's Kharif foodgrains record production of 138.52 million tonnes (4th Advance Estimates). However, kharif foodgrain production is 6.43 million tonnes more than the average production of five years (2011-12 to 2015-16) of 128.24 million tonnes.

Equity Markets: Stocks extended its latest spell of losses. Sentiment was hurt following worries of likely increase in fiscal deficit after expectations of fiscal stimulus. Global cues were also tepid and stocks in key sectors like banking & financials, FMCG, infra and auto corrected. Indices dropped for the fifth straight session.

Corporate News: The Confederation of Indian Industry (CII) has called for an interest rate cut of 100 basis points for boosting the economic growth rate. It has also suggested interventions for depreciation of the exchange rate that would increase export-related jobs. CII is of the firm belief that the current blip in growth rates is temporary and we are confident of a strong recovery by fiscal year end as industry gets over the teething problems of GST and other positive measures take effect. New investments will also start early next year as capacities fill up. said CII President Shobana Kamineni. A cut in interest rates would encourage domestic demand in sectors such as affordable housing, consumer durables and construction. Interest Rate Subvention in certain sectors such as exports, housing and MSME would also help raise growth, noted the CII statement. The index of mineral production of mining and quarrying sector for the month of July (new Series 2011-12=100) 2017 at 92.6, was 4.8% higher as compared to the level in the month of July 2016. The cumulative growth for the period April- July 2017-18 over the corresponding period of previous year has been (+) 2.1%. The total value of mineral production (excluding atomic & minor minerals) in the country during July 2017 was Rs. 18037 crore. The contribution of Coal was the highest at Rs. 5924 crore (33%).



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	151.0	(48.3)	(4.9)
MF(INR cr)	302.3	508.4	566.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	4,690	29,039	30,119
F&O(INR cr)	776,572	576,239	579,142

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.6	10.6	11.2
NSE VIX	13.3	12.2	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,165	(0.8) %	12.1 %	Energy	13,035	(0.1) %	10.3 %
IT	10,569	(0.6) %	(0.2) %	Pharma	9,297	(1.8) %	(11.5) %
Metals	3,450	(1.2) %	11.1 %	Finance	9,953	(1.1) %	12.8 %
Auto	10,808	(1.1) %	8.9 %	PSU	3,126	(0.9) %	(11.3) %
FMCG	24,981	(1.0) %	5.7 %	Real Estate	264	(3.1) %	20.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
United Bre	858	6.0 %	12.2 %	Interglobe	1,046	(6.1) %	0.2 %
Dabur Indi	312	2.5 %	11.4 %	Sun TV Net	783	(4.4) %	(1.5) %
Power Fin.	129	2.3 %	(12.8) %	JSW Steel	237	(4.1) %	25.4 %
Rural Elec	167	2.2 %	(6.9) %	DLF	167	(4.0) %	13.4 %
Tata Power	82	1.8 %	(8.2) %	ICICI Pru	389	(3.9) %	0.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ECB's Praet chairs speech in Frankfurt	26-09-2017	12:00	EUR	-	-
German Import Price Index (MoM) (AUG)	26-09-2017	06:00	EUR	-	(0.004)
German Import Price Index (YoY) (AUG)	26-09-2017	06:00	EUR	-	0.019
BBA Loans for House Purchase (AUG)	26-09-2017	08:30	GBP	-	41587
ANZ Activity Outlook (SEP)	26-09-2017	00:00	NZD	-	38.2
NBNZ Business Confidence (SEP)	26-09-2017	00:00	NZD	-	18.3
Conf. Board Expectations (SEP)	26-09-2017	14:00	USD	-	104
Conf. Board Present Situation (SEP)	26-09-2017	14:00	USD	-	151.2
Consumer Confidence (SEP)	26-09-2017	14:00	USD	-	122.9
Fed's Bostic Speaks to the Atlanta Press Club	26-09-2017	16:30	USD	-	-
Fed's Brainard Speaks on Labor Market Disparities	26-09-2017	14:30	USD	-	-
Fed's Mester Moderates Session NABE	26-09-2017	13:30	USD	-	-
New Home Sales (AUG)	26-09-2017	14:00	USD	-	-
New Home Sales (MoM) (AUG)	26-09-2017	14:00	USD	-	(0.094)
Richmond Fed Manufacturing Index (SEP)	26-09-2017	14:00	USD	-	14
S&P CoreLogic CS 20-City (MoM) SA (JUL)	26-09-2017	13:00	USD	-	0.001
S&P/Case-Shiller Composite-20 (YoY) (JUL)	26-09-2017	13:00	USD	-	0.057
S&P/Case-Shiller Home Price Index (JUL)	26-09-2017	13:00	USD	-	200.54
S&P/Case-Shiller US Home Price Index (JUL)	26-09-2017	13:00	USD	-	192.6
S&P/Case-Shiller US Home Price Index (YoY) (JUL)	26-09-2017	13:00	USD	-	0.0577
U.S. to Sell 4-Week Bills	26-09-2017	15:30	USD	-	-
U.S. to Sell USD26 Bln 2-Year Notes	26-09-2017	17:00	USD	-	-
Yellen Speaks on Inflation, Uncertainty, and Monetary Policy	26-09-2017	16:45	USD	-	-

..... End of Report