



26 Oct.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,295	0.9 %	11.4 %
BSE SENSEX	33,043	1.3 %	10.5 %
CNX BANK	25,036	3.4 %	16.2 %
CNX MIDCAP	19,212	1.6 %	10.8 %
CNX SMALLCAP	8,307	1.6 %	17.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,442	0.7 %	17.9 %
S&P 500	2,557	(0.5) %	13.3 %
FTSE 100	7,447	(1.1) %	3.8 %
HANG SENG	28,303	0.5 %	27.8 %
NIKKEI	21,708	(0.5) %	10.8 %
SHANGHAI COMPOSITE	3,397	0.3 %	8.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.90	(0.1) %	(3.7) %
EUR/USD	1.18	0.5 %	11.6 %
GBP/USD	1.33	0.4 %	7.9 %
USD/JPY	113.45	0.1 %	(2.2) %
USD/AUD	1.30	1.4 %	(5.3) %
USD/SGD	1.36	0.0 %	(4.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	1.1 %	0.3 %
Gold(INR/10g)	29,372	(0.8) %	5.6 %
Gold Comex(USD/oz)	1,276	(0.7) %	10.2 %
SILVER(INR/1Kg)	39,096	(0.4) %	0.4 %
Aluminium(USD/MT)	2,144	0.5 %	26.0 %
Copper(USD/MT)	7,074	1.6 %	26.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	0.1 %	(0.0) %

Global Economy: US durable goods orders surged in September. The US Department of Commerce reported that durable goods orders rose by 2.2% in September. Excluding the volatile transportation sector, orders were up 0.7% in the month. The UK economy expanded more-than-expected in the third quarter led by services, providing room for the Bank of England to hike the interest rate as early as next week. Gross domestic product grew 0.4% sequentially in the three months ended September, slightly faster than the 0.3% growth seen in the second quarter, preliminary estimate from the Office for National Statistics showed. Germany's business confidence improved to 116.7 in October from revised 115.3 in the previous month, reports said citing survey results from Ifo Institute. At the same time, the current conditions index came in at 124.8. The expectations indicator climbed to 109.1.

Global Equities: Profit selling hit US stocks, pulling them off record highs. Global stocks have stayed in exuberant mood this week amid supportive economic cues and political stability around the globe.

Indian Economy: RBI Governor Urjit Patel noted that a well-capitalized banking, and in general, financial intermediation, system is a pre-requisite for stable economic growth. Economic history has shown us repeatedly that it is only healthy banks that lend to healthy firms and borrowers, creating a virtuous cycle of investment and job creation. The Government of India's decisive package to restore the health of the Indian banking system is in the view of the Reserve Bank of India (RBI), a monumental step forward in safeguarding the country's economic future.

Equity Markets: Key benchmark indices settled with solid gains as various measures taken by the government to spur economy including capitalisation of public sector banks and massive road building program boosted sentiment. Both the Sensex and the Nifty, hit record closing highs. The Sensex settled above the psychologically important 33,000 level after crossing that milestone for the first time in history. Firmness in global stocks also supported gains on the bourses.

Corporate News: FMCG major Hindustan Unilever has reported second quarter (July-September) profit higher-than-expected at Rs 1,276 crore, growing 16.4% compared with Rs 1,096 crore in same quarter last fiscal. Revenue from operations was lower by 2% at Rs 8,309 crore for the quarter ended September 2017 while domestic consumer sales grew by 10% in Q2 post GST adjustment, the company said. NIIT Ltd reported 18% increase in consolidated profit after tax to Rs 12.7 crore in second quarter ended September 30, 2017. The GVK-led Mumbai International Airport (P) Ltd., (MIAL) was handed over the Letter of Award (LOA) today from CIDCO, the nodal agency of the Maharashtra Government for the Navi Mumbai International Airport.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(183.5)	(70.9)	(18.0)
MF(INR cr)	691.4	591.5	617.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	61,969	31,781	30,811
F&O(INR cr)	1,202,398	662,386	598,925

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.2	10.0	11.0
NSE VIX	11.8	11.6	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,036	3.4 %	16.2 %	Energy	14,398	0.7 %	21.8 %
IT	10,925	0.4 %	3.1 %	Pharma	9,347	(1.5) %	(11.0) %
Metals	3,873	0.4 %	24.7 %	Finance	10,145	1.7 %	14.9 %
Auto	11,150	0.6 %	12.4 %	PSU	4,010	29.6 %	13.7 %
FMCG	25,638	0.5 %	8.5 %	Real Estate	290	(0.4) %	32.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Punjab Nat	202	46.2 %	34.7 %	Yes Bank	327	(6.0) %	6.2 %
Bank of Ba	188	31.4 %	9.1 %	Bajaj Fin.	1,726	(5.5) %	46.1 %
St Bk of I	325	27.7 %	10.8 %	Torrent Ph	1,303	(5.3) %	(13.4) %
ICICI Bank	306	14.7 %	17.3 %	Kotak Mah.	1,011	(5.2) %	15.4 %
S A I L	67	8.8 %	6.2 %	Indiabulls	1,277	(4.9) %	28.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Export Price Index (QoQ) (3Q)	26-10-2017	0:30	AUD	-	(0.057)
Import Price Index (QoQ) (3Q)	26-10-2017	0:30	AUD	-	(0.001)
RBA's Debelle Gives Speech in Sydney	26-10-2017	7:45	AUD	-	-
ECB Deposit Facility Rate (OCT 26)	26-10-2017	11:45	EUR	-	(0.004)
ECB Marginal Lending Facility (OCT 26)	26-10-2017	11:45	EUR	-	0.0025
ECB press conference after Governing Council meeting	26-10-2017	12:30	EUR	-	-
European Central Bank Rate Decision (OCT 26)	26-10-2017	11:45	EUR	-	0
Euro-Zone M3 s.a. (YoY) (SEP)	26-10-2017	8:00	EUR	-	0.05
German GfK Consumer Confidence Survey (NOV)	26-10-2017	6:00	EUR	-	10.8
CBI Retailing Reported Sales (OCT)	26-10-2017	10:00	GBP	-	42
CBI Total Dist. Reported Sales (OCT)	26-10-2017	10:00	GBP	-	44
National Consumer Price Index (YoY) (SEP)	26-10-2017	23:30	JPY	-	0.007
National Consumer Price Index Ex-Fresh Food (YoY) (SEP)	26-10-2017	23:30	JPY	-	0.007
Natl CPI Ex Fresh Food, Energy (YoY) (SEP)	26-10-2017	23:30	JPY	-	0.002
Tokyo Consumer Price Index (YoY) (OCT)	26-10-2017	23:30	JPY	-	0.005
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (OCT)	26-10-2017	23:30	JPY	-	0.005
Tokyo CPI Ex-Fresh Food, Energy (YoY) (OCT)	26-10-2017	23:30	JPY	-	-
Advance Goods Trade Balance (SEP)	26-10-2017	12:30	USD	-	-
Continuing Claims (OCT 14)	26-10-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (OCT 20)	26-10-2017	14:30	USD	-	51
EIA Working Natural Gas Implied Flow (OCT 20)	26-10-2017	14:30	USD	-	51
Initial Jobless Claims (OCT 21)	26-10-2017	12:30	USD	-	-
Kansas City Fed Manf. Activity (OCT)	26-10-2017	15:00	USD	-	17
Pending Home Sales (MoM) (SEP)	26-10-2017	14:00	USD	-	(0.026)
Pending Home Sales (YoY) (SEP)	26-10-2017	14:00	USD	-	(0.031)
Retail Inventories (MoM) (SEP)	26-10-2017	12:30	USD	-	0.007
U.S. to Sell USD28 Bln 7-Year Notes	26-10-2017	17:00	USD	-	-
Wholesale Inventories (SEP P)	26-10-2017	12:30	USD	-	0.009



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