



27 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,087	0.7 %	9.2 %
BSE SENSEX	32,382	0.5 %	9.0 %
CNX BANK	24,876	0.8 %	15.4 %
CNX MIDCAP	18,519	0.5 %	6.8 %
CNX SMALLCAP	7,865	0.3 %	11.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,711	0.5 %	9.2 %
S&P 500	2,478	0.0 %	9.7 %
FTSE 100	7,452	0.2 %	3.8 %
HANG SENG	26,941	0.3 %	21.6 %
NIKKEI	20,050	0.5 %	2.3 %
SHANGHAI COMPOSITE	3,248	0.1 %	3.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.37	(0.0) %	(4.5) %
EUR/USD	1.17	0.8 %	10.8 %
GBP/USD	1.31	0.8 %	6.8 %
USD/JPY	110.94	(0.9) %	(4.3) %
USD/AUD	1.24	(1.6) %	(9.0) %
USD/SGD	1.36	(0.5) %	(5.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	3.3 %	(8.5) %
Gold(INR/10g)	28,327	(0.3) %	1.9 %
Gold Comex(USD/oz)	1,270	1.3 %	9.7 %
SILVER(INR/1Kg)	37,737	0.5 %	(3.0) %
Aluminium(USD/MT)	1,912	0.8 %	12.3 %
Copper(USD/MT)	6,238	1.4 %	11.9 %

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	(0.1) %	(0.2) %

Global Economy: The Federal Reserve still plans to raise interest rates again this year and will begin to unwind its bloated balance sheet "relatively soon", it was announced Wednesday. The Federal Open Market Committee voted to maintain its key interest rate at a 1.00 to 1.25 percent range, having raised the fed funds rate twice already this year. Policy makers did not offer a specific timeline for further rate hikes. Fed statement acknowledged inflation was "running below 2%" instead of "running somewhat below 2%," a downbeat assessment compared to the June statement. The Fed said it will start to sell its \$4.25 trillion holdings of Treasuries and mortgage-related debt relatively soon.

Global Equities: US stocks jumped on Wednesday, with soaring shares of Boeing sending the Dow Jones Industrial Average to a new record high. All three equity benchmarks finished at all-time highs following the Fed statement.

Indian Economy: Mineral Production during May 2017 (Provisional) The index of mineral production of mining and quarrying sector for the month of May (new Series 2011-12=100) 2017 at 100.5, was 0.9% lower as compared to the level in the month of May 2016. The total value of mineral production (excluding atomic & minor minerals) in the country during May 2017 was Rs. 19944 crore. The contribution of Coal was the highest at Rs. 7171 crore (36%).

Equity Markets: Market registered modest gains on positive global cues. The Nifty closed above the psychologically important 10,000-mark for the first time. Both the Sensex, and the Nifty, hit record high in the intraday as well as on the closing basis. Key indices opened the session with small gains amid initial volatility. Later, indices hovered in green with small to modest gains. Key indices extended intraday gains towards the late trade to hit fresh record highs.

Corporate News: HCL Technologies, ICICI Bank, Idea Cellular, ITC, Maruti Suzuki and ONGC are among the companies that will be announcing their June quarter earnings today, 27 July 2017. State Bank of India (SBI) announced that its board approved extension of validity period to raise the remaining Additional Tier I capital to the tune of Rs 2000 crore till 31 March 2018 and accordingly authorized bank to raise upto Rs 2000 crore Additional Tier I capital, by way of issue of Basel III compliant perpetual debt instruments in USD and/or INR, at par, through private placement to overseas and/or Indian investors, in such number of tranches, at such times as may be considered appropriate and on such coupons as may be decided at the time of actual issuance. The announcement was made after market hours yesterday, 26 July 2017. Tata Motors announced that a committee of board approved offering for subscription, on a private placement basis, up to 10,000 rated, listed, unsecured, redeemable, non-convertible debentures (NCDs) E27-I series of face value Rs 10 lakh each, at par, aggregating up to Rs 1000 crore, comprising of two tranches of debentures of Rs 500 crore each. Nestle India's net profit rose 9.66% to Rs 263.43 crore on 6.91% rise in total income to Rs 2443.44 crore in Q2 June 2017 over Q2 June 2016.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	49.9	13.5	26.1
MF(INR cr)	1,038.1	390.0	466.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,128	32,233	30,103
F&O(INR cr)	694,741	556,897	541,740

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.6	10.3	11.2
NSE VIX	11.2	11.2	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,671	0.6 %	14.5 %	Energy	12,792	0.8 %	8.2 %
IT	10,783	(0.3) %	1.8 %	Pharma	10,037	1.1 %	(4.4) %
Metals	3,283	1.7 %	5.7 %	Finance	9,987	0.3 %	13.2 %
Auto	11,004	0.6 %	10.9 %	PSU	3,573	(0.5) %	1.3 %
FMCG	26,100	0.7 %	10.4 %	Real Estate	283	0.5 %	29.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	1,712	5.8 %	11.2 %	ICICI Pru	450	(3.8) %	16.9 %
Bajaj Fin.	1,687	3.7 %	42.8 %	Idea Cellu	95	(3.2) %	11.1 %
Godrej Con	1,029	2.8 %	21.3 %	Axis Bank	529	(3.0) %	5.6 %
IndusInd B	1,580	2.4 %	12.6 %	Pidilite I	806	(2.7) %	14.6 %
Vedanta	281	2.4 %	3.0 %	Punjab Nat	159	(2.5) %	6.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Export Price Index (QoQ) (2Q)	27-07-2017	1:30	AUD	-	0.094
Import Price Index (QoQ) (2Q)	27-07-2017	1:30	AUD	-	0.012
Industrial Profits (YoY) (Jun)	27-07-2017	1:30	CNY	-	0.167
Swift Global Payments CNY (Jun)	27-07-2017	1:00	CNY	-	0.0161
Euro-Zone M3 s.a. (YoY) (Jun)	27-07-2017	8:00	EUR	-	0.05
German GfK Consumer Confidence Survey (Aug)	27-07-2017	6:00	EUR	-	10.6
- CBI - Enquête sur le Commerce de Distribution (Jul)	27-07-2017	10:00	GBP	-	17
CBI Retailing Reported Sales (Jul)	27-07-2017	10:00	GBP	-	12
GfK Consumer Confidence Survey (Jul)	27-07-2017	23:01	GBP	-	(10)
BOJ Summary of Opinions at July 19-20 Meeting	27-07-2017	23:50	JPY	-	-
Household Spending (YoY) (Jun)	27-07-2017	23:30	JPY	-	(0.001)
Jobless Rate (Jun)	27-07-2017	23:30	JPY	-	0.031
Job-To-Applicant Ratio (Jun)	27-07-2017	23:30	JPY	-	1.49
Large Retailers' Sales (Jun)	27-07-2017	23:50	JPY	-	(0.006)
National Consumer Price Index (YoY) (Jun)	27-07-2017	23:30	JPY	-	0.004
National Consumer Price Index Ex-Fresh Food (YoY) (Jun)	27-07-2017	23:30	JPY	-	0.004
Natl CPI Ex Fresh Food, Energy (YoY) (Jun)	27-07-2017	23:30	JPY	-	0
Retail Trade (YoY) (Jun)	27-07-2017	23:50	JPY	-	0.02
Retail Trade s.a. (MoM) (Jun)	27-07-2017	23:50	JPY	-	(0.016)
Tokyo Consumer Price Index (YoY) (Jul)	27-07-2017	23:30	JPY	-	0
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (Jul)	27-07-2017	23:30	JPY	-	0
Tokyo CPI Ex-Fresh Food, Energy (YoY) (Jul)	27-07-2017	23:30	JPY	-	(0.002)
Advance Goods Trade Balance (Jun)	27-07-2017	12:30	USD	-	-
Cap Goods Orders Nondef Ex Air (Jun P)	27-07-2017	12:30	USD	-	0.002
Cap Goods Ship Nondef Ex Air (Jun P)	27-07-2017	12:30	USD	-	0.001
Chicago Fed Nat Activity Index (Jun)	27-07-2017	12:30	USD	-	(0.26)
Continuing Claims (Jul 15)	27-07-2017	12:30	USD	-	-
Durable Goods Orders (Jun P)	27-07-2017	12:30	USD	-	(0.008)
Durable Goods Orders Ex Transportation (Jun P)	27-07-2017	12:30	USD	-	0.002



EIA Natural Gas Storage Change (Jul 21)	27-07-2017	14:30	USD	-	28
EIA Working Natural Gas Implied Flow (Jul 21)	27-07-2017	14:30	USD	-	28
Fed nominee Quarles confirmation hearing at Senate Banking	27-07-2017	14:00	USD	-	-
Initial Jobless Claims (Jul 22)	27-07-2017	12:30	USD	-	-
Kansas City Fed Manf. Activity (Jul)	27-07-2017	15:00	USD	-	11
Retail Inventories (MoM) (Jun)	27-07-2017	12:30	USD	-	0.006
U.S. to Sell USD28 Bln 7-Year Notes	27-07-2017	17:00	USD	-	-
Wholesale Inventories (Jun P)	27-07-2017	12:30	USD	-	0.004

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