



27 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,872	(0.0) %	6.9 %
BSE SENSEX	31,600	(0.1) %	5.6 %
CNX BANK	24,199	0.1 %	12.3 %
CNX MIDCAP	18,260	0.6 %	5.4 %
CNX SMALLCAP	7,584	0.7 %	7.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,284	(0.1) %	12.1 %
S&P 500	2,497	0.0 %	10.6 %
FTSE 100	7,286	(0.2) %	1.5 %
HANG SENG	27,513	0.1 %	24.2 %
NIKKEI	20,330	(0.3) %	3.8 %
SHANGHAI COMPOSITE	3,344	0.1 %	6.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.45	1.0 %	(2.9) %
EUR/USD	1.18	(1.4) %	11.2 %
GBP/USD	1.34	(0.4) %	9.3 %
USD/JPY	112.38	0.4 %	(3.1) %
USD/AUD	1.27	1.0 %	(7.3) %
USD/SGD	77.16	5,633.3 %	5,296.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	3.1 %	(0.2) %
Gold(INR/10g)	30,127	1.4 %	8.3 %
Gold Comex(USD/oz)	1,314	1.1 %	13.5 %
SILVER(INR/1Kg)	39,822	1.1 %	2.3 %
Aluminium(USD/MT)	2,128	(0.4) %	25.0 %
Copper(USD/MT)	6,416	0.2 %	15.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	(0.0) %	(0.2) %

Global Economy: A report released by the Conference Board on Tuesday showed a deterioration in US consumer confidence in the month of September. The Conference Board said its consumer confidence index dropped to 199.8 in September from a revised 120.4 in August. US Federal Reserve Chair Janet Yellen hinted at imminent rate hikes as she noted that the Fed should be wary of moving too gradually. Given that monetary policy affects economic activity and inflation with a substantial lag, it would be imprudent to keep monetary policy on hold until inflation is back to 2%, she noted in a speech.

Global Equities: US stocks witnessed a lackluster performance following the comments from Yellen. Overall sentiments remained weary.

Indian Economy: The Asian Development Bank (ADB) has cut India's GDP growth forecast for the current fiscal to 7% from 7.4% it estimated in July, citing weakness in private consumption, manufacturing output and business investment. The latest growth projection is also lower than the 7.1% GDP growth recorded in 2016-17. For 2018-19, the bank sees 7.4% growth, down from the earlier forecast of 7.6%.

Equity Markets: Key benchmark indices settled with small losses in a range-bound session of trade. Indices fell for the sixth straight session. The Sensex, and the Nifty, hit their lowest closing level in four weeks. Weakness in global stocks amid fresh threats from North Korea weighed on sentiment on the domestic bourses. Bank stocks were mixed. Metal & mining stocks gained on bargain hunting after recent losses. Tata Motors edged higher after media reports suggested that its foreign unit Jaguar Land Rover (JLR) is eyeing potential acquisitions of international automakers.

Corporate News: IT major TCS said that its UK-based subsidiary, Diligenta, secured a 15 year partnership with Scottish Widows, Lloyds Banking Group's Life and Pensions business. Diligenta is a leading life and pensions BPS provider in the UK. Under the terms of this agreement, Diligenta will support Scottish Widows to provide end-to-end policy administration services for its 4 million heritage customers. ICICI Lombard General Insurance Company debuts on the secondary equity market today, 27 September 2017. The company priced the initial public offer (IPO) at the top end of the Rs 651-661 price band. The IPO received bids for 18.35 crore shares, data on NSE showed. The IPO was subscribed 2.98 times. The IPO opened for subscription on 15 September 2017 and closed on 19 September 2017. TVS Motor Company announced that its scooter brand, TVS Jupiter, clocked sales of 2 million units within 4 years of its launch. IDBI Bank said it tied up with Boston Consulting Group (BCG) to boost financial health. BCG will assist IDBI Bank to identify areas for cost containment and revenue maximization leading to sustainable growth and profitability of the bank.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(4.5)	(45.7)	(4.9)
MF(INR cr)	1,116.4	534.9	569.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	4,002	27,648	29,903
F&O(INR cr)	736,920	585,166	580,446

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.2	10.6	11.2
NSE VIX	12.9	12.3	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,199	0.1 %	12.3 %	Energy	13,024	(0.1) %	10.2 %
IT	10,549	(0.2) %	(0.4) %	Pharma	9,298	0.0 %	(11.5) %
Metals	3,533	2.4 %	13.8 %	Finance	9,952	(0.0) %	12.8 %
Auto	10,816	0.1 %	9.0 %	PSU	3,122	(0.1) %	(11.4) %
FMCG	24,872	(0.4) %	5.2 %	Real Estate	272	2.7 %	23.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oil India	349	5.1 %	5.8 %	Rural Elec	161	(3.9) %	(10.6) %
O N G C	171	4.0 %	(7.8) %	Bharti Inf	376	(3.8) %	14.2 %
Vedanta	318	3.7 %	16.7 %	B P C L	469	(3.7) %	10.3 %
Torrent Ph	1,271	3.3 %	(15.6) %	Hind. Unil	1,217	(2.4) %	32.2 %
Indiabulls	1,243	3.2 %	24.8 %	Tata Power	80	(2.3) %	(10.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Press Conference -- Bank of Canada Governor Stephen Poloz	27-09-2017	16:55	CAD	-	-
Speech - Stephen S. Poloz, Governor	27-09-2017	15:45	CAD	-	-
Credit Suisse Survey Expectations (SEP)	27-09-2017	08:00	CHF	-	25
UBS Consumption Indicator (AUG)	27-09-2017	06:00	CHF	-	1.38
Industrial Profits (YoY) (AUG)	27-09-2017	01:30	CNY	-	0.165
Euro-Zone M3 s.a. (YoY) (AUG)	27-09-2017	08:00	EUR	-	0.045
CBI Retailing Reported Sales (SEP)	27-09-2017	10:00	GBP	-	(10)
CBI Total Dist. Reported Sales (SEP)	27-09-2017	10:00	GBP	-	2
BOJ Outright Bond Purchase 1~3 Years	27-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	27-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	27-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	27-09-2017	01:10	JPY	-	-
Foreign Buying Japan Bonds (Yen) (SEP 22)	27-09-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (SEP 22)	27-09-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (SEP 22)	27-09-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (SEP 22)	27-09-2017	23:50	JPY	-	-
Machine Tool Orders (YoY) (AUG F)	27-09-2017	06:00	JPY	-	0.363
Small Business Confidence (SEP)	27-09-2017	05:00	JPY	-	49
Reserve Bank of New Zealand Rate Decision (SEP 28)	27-09-2017	20:00	NZD	-	0.0175
Cap Goods Orders Nondef Ex Air (AUG P)	27-09-2017	12:30	USD	-	0.01
Cap Goods Ship Nondef Ex Air (AUG P)	27-09-2017	12:30	USD	-	0.012
DOE Cushing OK Crude Inventory (SEP 22)	27-09-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (SEP 22)	27-09-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (SEP 22)	27-09-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (SEP 22)	27-09-2017	14:30	USD	-	-
Durable Goods Orders (AUG P)	27-09-2017	12:30	USD	-	(0.068)
Durables Ex Transportation (AUG P)	27-09-2017	12:30	USD	-	0.006
Fed's Brainard Speaks at Minority Banker Forum	27-09-2017	18:00	USD	-	-
Fed's Bullard Speaks on Economic and Monetary Policy	27-09-2017	17:30	USD	-	-



Fed's Rosengren to Speak to Money Marketeers in New York	27-09-2017	23:00	USD	-	-
MBA Mortgage Applications (SEP 22)	27-09-2017	11:00	USD	-	(0.097)
Pending Home Sales (MoM) (AUG)	27-09-2017	14:00	USD	-	(0.008)
Pending Home Sales (YoY) (AUG)	27-09-2017	14:00	USD	-	(0.005)
U.S. to Sell USD13 Bln 2-Year Floating Rate Notes	27-09-2017	15:30	USD	-	-
U.S. to Sell USD34 Bln 5-Year Notes	27-09-2017	17:00	USD	-	-

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