



27 Oct.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,344	0.5 %	12.0 %
BSE SENSEX	33,147	0.3 %	10.8 %
CNX BANK	25,022	(0.1) %	16.1 %
CNX MIDCAP	19,341	0.7 %	11.6 %
CNX SMALLCAP	8,354	0.6 %	18.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,401	0.3 %	17.7 %
S&P 500	2,560	0.1 %	13.4 %
FTSE 100	7,487	0.5 %	4.3 %
HANG SENG	28,202	(0.4) %	27.3 %
NIKKEI	21,740	0.2 %	11.0 %
SHANGHAI COMPOSITE	3,408	0.3 %	8.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.90	(0.3) %	(3.7) %
EUR/USD	1.18	0.6 %	11.6 %
GBP/USD	1.33	1.0 %	7.9 %
USD/JPY	113.45	(0.4) %	(2.2) %
USD/AUD	1.30	0.1 %	(5.3) %
USD/SGD	1.36	(0.2) %	(4.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(0.6) %	(0.3) %
Gold(INR/10g)	29,393	0.1 %	5.7 %
Gold Comex(USD/oz)	1,282	0.5 %	10.7 %
SILVER(INR/1Kg)	39,173	0.2 %	0.6 %
Aluminium(USD/MT)	2,150	0.3 %	26.3 %
Copper(USD/MT)	6,971	(1.5) %	25.1 %

**FIXED INCOME**

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

**Global Economy:** Pending home sales in the US were unexpectedly flat in the month of September, according to a report released by the National Association of Realtors on Thursday. NAR said its pending home sales index came in at 106.0 in September, unchanged from a downwardly revised reading for August. After reporting first-time claims for US unemployment benefits at their lowest level in over forty years in the previous week, the Labor Department released a report showing a modest rebound in initial jobless claims in the week ended October 21st. The report said initial jobless claims rose to 233,000. The European Central Bank said that it will reduce the size of its monthly asset purchases to EUR 30 billion from the start of next year and will continue them at least till September.

**Global Equities:** US stocks ended mixed while European markets jumped after European Central Bank took its first cautious steps toward monetary policy normalization.

**Indian Economy:** The Indian government's announcement of large recapitalisation plans for state banks is a significant change from the drip-feed approach pursued over the last few years and should help to address the capital shortages that are a major negative influence on the Viability Ratings of the banks, noted Fitch Ratings, according to media reports. State banks will now receive INR2.11 trillion (USD32 billion) in new capital over the next two years, with the government providing USD24 billion.

**Equity Markets:** Key benchmark indices settled with modest gains in a volatile session of trade as firmness in European stocks supported gains on the bourses. The Sensex and the Nifty hit record closing highs. Market gained for the fourth straight session. Volatility was witnessed during the session as near month derivatives contracts expired.

**Corporate News:** Yes Bank's net profit rose 25.1% to Rs 1002.73 crore on 21.4% growth in total income to Rs 6048.78 crore in Q2 September 2017 over Q2 September 2016. The bank's gross non-performing assets (NPAs) stood at Rs 2720.34 crore as on 30 September 2017 as against Rs 1364.38 crore as on 30 June 2017 and Rs 916.68 crore as on 30 September 2016. The ratio of net NPAs to net advances stood at 1.04% as on 30 September 2017 as against 0.39% as on 30 June 2017 and 0.29% as on 30 September 2016. The bank's provisions and contingencies surged 176.52% to Rs 447.06 crore in Q2 September 2017 over Q2 September 2016. ICICI Bank, ITC, Maruti Suzuki India and Indian Oil Corporation will announce July-September 2017 quarterly results today, 27 October 2017. Biocon's consolidated net profit fell 53.10% to Rs 68.80 crore on 2.41% increase in net sales to Rs 968.60 crore in Q2 September 2017 over Q2 September 2016.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	1,045.8	3.5	(10.3)
MF(INR cr)	691.4	591.5	617.1

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	57,201	33,276	30,998
F&O(INR cr)	1,484,651	710,755	605,207

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.2	10.1	11.0
NSE VIX	11.6	11.6	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,022	(0.1) %	16.1 %	Energy	14,579	1.3 %	23.3 %
IT	10,883	(0.4) %	2.7 %	Pharma	9,428	0.9 %	(10.2) %
Metals	3,952	2.1 %	27.2 %	Finance	10,157	0.1 %	15.1 %
Auto	11,213	0.6 %	13.0 %	PSU	3,988	(0.5) %	13.1 %
FMCG	25,644	0.0 %	8.5 %	Real Estate	292	0.4 %	33.1 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
SAIL	77	14.9 %	21.9 %	Torrent Ph	1,248	(4.2) %	(17.1) %
BHEL	97	6.4 %	(13.3) %	HCL Techno	869	(4.2) %	0.3 %
Punjab Nat	214	5.7 %	42.4 %	Idea Cellu	97	(2.4) %	13.6 %
BPC L	536	5.2 %	26.0 %	Indiabulls	1,248	(2.2) %	25.3 %
NMDC	127	4.7 %	(4.9) %	ICICI Bank	299	(2.1) %	14.8 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Producer Price Index (QoQ) (3Q)	27-10-2017	0:30	AUD	-	0.005
Producer Price Index (YoY) (3Q)	27-10-2017	0:30	AUD	-	0.017
Industrial Profits (YoY) (SEP)	27-10-2017	1:30	CNY	-	0.24
ECB Survey of Professional Forecasters	27-10-2017	8:00	EUR	-	-
ECB's Praet Speaks in Frankfurt	27-10-2017	7:15	EUR	-	-
German Import Price Index (MoM) (SEP)	27-10-2017	6:00	EUR	-	0
German Import Price Index (YoY) (SEP)	27-10-2017	6:00	EUR	-	0.021
BOJ Outright Bond Purchase 10~25 Years	27-10-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	27-10-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	27-10-2017	1:10	JPY	-	-
Baker Hughes U.S. Rig Count (OCT 27)	27-10-2017	17:00	USD	-	913
Core Personal Consumption Expenditure (QoQ) (3Q A)	27-10-2017	12:30	USD	-	0.009
Gross Domestic Product (Annualized) (3Q A)	27-10-2017	12:30	USD	-	0.031
Gross Domestic Product Price Index (3Q A)	27-10-2017	12:30	USD	-	0.01
Personal Consumption (3Q A)	27-10-2017	12:30	USD	-	0.033
U. of Mich. 1 Yr Inflation (OCT F)	27-10-2017	14:00	USD	-	0.023
U. of Mich. 5-10 Yr Inflation (OCT F)	27-10-2017	14:00	USD	-	0.024
U. of Mich. Current Conditions (OCT F)	27-10-2017	14:00	USD	-	116.4
U. of Mich. Expectations (OCT F)	27-10-2017	14:00	USD	-	91.3
U. of Michigan Confidence (OCT F)	27-10-2017	14:00	USD	-	101.1

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