



28 Jun.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,494	(0.2) %	2.8 %
BSE SENSEX	30,958	(0.6) %	3.3 %
CNX BANK	23,195	(0.1) %	7.6 %
CNX MIDCAP	17,413	(0.2) %	0.5 %
CNX SMALLCAP	7,176	(0.2) %	1.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,311	(0.5) %	7.2 %
S&P 500	2,419	(0.8) %	7.2 %
FTSE 100	7,434	(0.2) %	3.6 %
HANG SENG	25,840	(0.1) %	16.7 %
NIKKEI	20,225	0.4 %	3.2 %
SHANGHAI COMPOSITE	3,191	0.2 %	1.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.53	0.0 %	(4.3) %
EUR/USD	1.13	1.4 %	7.1 %
GBP/USD	1.28	0.8 %	4.2 %
USD/JPY	112.12	0.8 %	(3.3) %
USD/AUD	1.31	(0.6) %	(4.0) %
USD/SGD	1.39	(0.2) %	(3.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	44	2.0 %	(15.5) %
Gold(INR/10g)	28,738	(0.1) %	3.3 %
Gold Comex(USD/oz)	1,253	0.6 %	8.3 %
SILVER(INR/1Kg)	38,538	(0.2) %	(1.0) %
Aluminium(USD/MT)	1,862	0.4 %	9.4 %
Copper(USD/MT)	5,789	0.3 %	3.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	0.1 %	(0.3) %

Global Economy: Consumer confidence in the US unexpectedly improved in the month of June, according to a report released by the Conference Board on Tuesday. The Conference Board said its consumer confidence index rose to 118.9 in June from a downwardly revised 117.6 in May. The European Central Bank will need to be prudent in withdrawing monetary stimulus as that can be done only gradually with the euro area still in need of considerable policy support to bring inflation back to target in a sustainable way, ECB President Mario Draghi said in a speech.

Global Equities: US stocks tumbled as a retreat from record highs last week continued. Tech stocks were hammered in particular.

Indian Economy: The total sown area as on 23rd June 2017, as per reports received from States, stands at 130.74 lakh hectare as compared to 119.28 lakh hectare at this time last year. It is reported that rice has been sown/transplanted in 16.70 lakh ha, pulses in 5.97 lakh ha, coarse cereals in 17.71 lakh ha, sugarcane in 47.52 lakh hectare and cotton in 24.70 lakh ha.

Equity Markets: Key benchmark indices closed the first trading session of the week with modest losses. The Sensex settled below the psychological 31,000 level. Negative cues from European markets spoiled investors' sentiment. Geopolitical tensions also weighed on market sentiment amid reports suggesting that China accused Indian troops of crossing the boundary in the Sikkim region and demanded their immediate withdrawal, while asserting that it stopped the Indian pilgrims who enter Tibet via the Himalayan pass of Nathu La for safety reasons in view of the border issue.

Corporate News: Hero MotoCorp announced after market hours yesterday, 27 June 2017 that Life Insurance Corporation of India (LIC) sold 2.026% stake in the company. The transaction took place between 1 October 2015 and 21 June 2017. Post transaction, LIC holds 5.136% stake in Hero MotoCorp, compared with 7.162% stake held earlier. TCS announced after market hours yesterday, 27 June 2017 that TMX Group awarded TCS, the implementation of a single, integrated technology platform for Canada's clearing and settlement businesses. The innovative platform, called TCS BaNCS for Market Infrastructure, will replace the legacy systems deployed by The Canadian Depository for Securities Limited (CDS) and Canadian Derivatives Clearing Corporation (CDCC), subject to regulatory approval where required. Jagran Prakashan announced after market hours yesterday, 27 June 2017, that Jagran Media Network Investment (JMNIPL) holds 60.63% in Jagran Prakashan. Blackstone GPV Capital Partners (Mauritius) V-Q (BCP-V) previously held 12.82% of the total equity share capital of JMNIPL. Pursuant to sale transaction concluded in two tranches on 1 March 2017 and 25 April 2017, BCP-V has sold its entire shareholding in JMNIPL to the existing promoters of JMNIPL.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	75.7	22.3	28.2
MF(INR cr)	271.6	411.4	485.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,458	27,025	29,520
F&O(INR cr)	826,123	497,582	522,372

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.1	10.5	11.4
NSE VIX	12.5	11.2	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,216	(1.4) %	7.7 %	Energy	11,778	0.1 %	(0.3) %
IT	10,069	(1.0) %	(4.9) %	Pharma	9,468	(0.1) %	(9.9) %
Metals	2,885	(0.3) %	(7.1) %	Finance	9,539	(1.1) %	8.1 %
Auto	10,576	(0.6) %	6.6 %	PSU	3,328	(3.4) %	(5.6) %
FMCG	26,188	0.1 %	10.8 %	Real Estate	260	(1.3) %	18.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Shriram Tr	989	2.3 %	(10.4) %	Punjab Nat	137	(4.8) %	(8.6) %
Idea Cellu	81	2.3 %	(4.6) %	Rural Elec	169	(4.0) %	(5.9) %
I O C L	390	1.8 %	2.4 %	Bank of Ba	155	(3.7) %	(10.2) %
Hind.Zinc	255	1.7 %	(12.5) %	Bajaj Fin.	1,350	(3.6) %	14.2 %
Motherson	470	1.7 %	25.2 %	ACC	1,579	(3.6) %	8.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Bank of Canada Deputy Governor Lynn Patterson Speaks	28-06-2017	18:15	CAD	-	-
Bank of Canada's Poloz at ECB Panel	28-06-2017	13:30	CAD	-	-
Credit Suisse Survey Expectations (JUN)	28-06-2017	8:00	CHF	-	30.8
UBS Consumption Indicator (MAY)	28-06-2017	6:00	CHF	-	1.48
Euro-Zone M3 s.a. (YoY) (MAY)	28-06-2017	8:00	EUR	-	0.049
German Import Price Index (MoM) (MAY)	28-06-2017	6:00	EUR	-	(0.001)
German Import Price Index (YoY) (MAY)	28-06-2017	6:00	EUR	-	0.061
Foreign Buying Japan Bonds (Yen) (JUN 23)	28-06-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (JUN 23)	28-06-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUN 23)	28-06-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUN 23)	28-06-2017	23:50	JPY	-	-
Large Retailers' Sales (MAY)	28-06-2017	23:50	JPY	-	0.011
Loans & Discounts Corp (YoY) (MAY)	28-06-2017	23:50	JPY	-	0.037
Retail Trade (YoY) (MAY)	28-06-2017	23:50	JPY	-	0.032
Retail Trade s.a. (MoM) (MAY)	28-06-2017	23:50	JPY	-	0.014
Small Business Confidence (JUN)	28-06-2017	5:00	JPY	-	48.9
Advance Goods Trade Balance (MAY)	28-06-2017	12:30	USD	-	-
DOE Cushing OK Crude Inventory (JUN 23)	28-06-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 23)	28-06-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUN 23)	28-06-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUN 23)	28-06-2017	14:30	USD	-	-
Fed's Williams Speaks in Canberra	28-06-2017	7:30	USD	-	-
MBA Mortgage Applications (JUN 23)	28-06-2017	11:00	USD	-	0.006
Pending Home Sales (MoM) (MAY)	28-06-2017	14:00	USD	-	(0.013)
Pending Home Sales (YoY) (MAY)	28-06-2017	14:00	USD	-	(0.054)
Retail Inventories (MoM) (MAY)	28-06-2017	12:30	USD	-	(0.003)
U.S. to Sell USD13 2-Year Floating Rate Notes	28-06-2017	15:30	USD	-	-
U.S. to Sell USD28 Bln 7-Year Notes	28-06-2017	17:00	USD	-	-
Wholesale Inventories (MAY 23)	28-06-2017	12:30	USD	-	(0.005)



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