



28 Aug.2017

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 9,857 | 0.0 % | 6.7 % |
| BSE SENSEX | 31,596 | 0.1 % | 5.6 % |
| CNX BANK | 24,274 | (0.2) % | 12.7 % |
| CNX MIDCAP | 17,964 | 0.6 % | 3.6 % |
| CNX SMALLCAP | 7,516 | 0.6 % | 6.3 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| DOW JONES | 21,814 | 0.1 % | 9.7 % |
| S&P 500 | 2,443 | 0.2 % | 8.2 % |
| FTSE 100 | 7,401 | (0.1) % | 3.1 % |
| HANG SENG | 27,848 | 1.2 % | 25.7 % |
| NIKKEI | 19,453 | 0.5 % | (0.7) % |
| SHANGHAI COMPOSITE | 3,332 | 1.8 % | 6.2 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 64.03 | (0.1) % | (5.0) % |
| EUR/USD | 1.18 | (0.0) % | 11.3 % |
| GBP/USD | 1.28 | 0.2 % | 4.1 % |
| USD/JPY | 109.68 | 0.5 % | (5.4) % |
| USD/AUD | 1.27 | 0.1 % | (7.4) % |
| USD/SGD | 1.36 | 0.0 % | (4.8) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 48 | (1.1) % | (8.5) % |
| Gold(INR/10g) | 28,879 | (0.3) % | 3.8 % |
| Gold Comex(USD/oz) | 1,297 | 0.2 % | 12.0 % |
| SILVER(INR/1Kg) | 38,714 | (0.5) % | (0.5) % |
| Aluminium(USD/MT) | 2,097 | (0.4) % | 23.2 % |
| Copper(USD/MT) | 6,714 | 2.1 % | 20.5 % |

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) % | (0.3) % |

Global Economy: After reporting a sharp jump in new orders for US manufactured durable goods in the previous month, the Commerce Department released a report on Friday showing a sharp pullback in durable goods orders in the month of July. The Commerce Department said durable goods orders plunged by 6.8%. The euro broke \$1.19 to hit its highest level against the dollar since January 2015 as Mario Draghi, president of the European Central Bank, delivered a keenly awaited speech to the central bank symposium in Jackson Hole, Wyoming. He noted that significant monetary accommodation is still needed and that inflation is not yet converging to the central bank's target. Janet Yellen, the US Federal Reserve chair delivered a cautious speech that offered little in the way of fresh information about the outlook for monetary policy.

Global Equities: US stocks were steady on Friday. While the Dow and the S&P 500 remained in positive territory, the tech-heavy Nasdaq ended marginally into the red.

Indian Economy: Local Petrol price has been hiked by Rs 6 per litre since the beginning of July and is now priced at its highest rate in three years. Diesel price has increased by Rs 3.67 a litre and now costs Rs 57.03 a litre in Delhi, the highest in four months, according to data from state-owned oil companies. A litre of petrol now costs Rs 69.04 a litre in Delhi, the highest since second-half of August 2014.

Equity Markets: Key benchmark indices closed the last session near the flat line in a lackluster trading. Stocks of public sector banks gained after the Union Cabinet chaired by the Prime Minister Narendra Modi gave in-principle approval for PSBs to amalgamate through an Alternative Mechanism. Stocks of private sector banks edged lower. Pharma stocks surged. Cadila Healthcare jumped after the company announced that it has received final approval from US drug regulator to market Candesartan Cilexetil Tablets in four dosages. Software major Infosys extended previous trading session's gains on buzz the company's co-founder Nandan Nilekani is likely to return as the head of the IT bellwether.

Corporate News: Niti Aayog has suggested spinning off Coal India subsidiaries into separate entities so that each can independently develop its own strategy and business model. The government move to address the non-performing assets (NPAs) pain in the steel sector is expected to clear a major roadblock for the banking sector to resume lending to the crippled segment. The top five large steel entities under stress have an aggregate debt of Rs 1,48,290 crore. The ministries of finance, steel and the PMO coming together to solve the NPA problem is expected clear the major roadblock for banks to lend to the sector, said a report by SBI. Realty major DLF has entered into a joint venture with GIC to build rental assets in India after its promoters sold 33.34% stake in the rental arm to the Singapore sovereign wealth fund for Rs 8,900 crore.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (142.7) | (134.5) | 1.6 |
| MF(INR cr) | (38.4) | 554.3 | 480.4 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 27,550 | 30,220 | 30,318 |
| F&O(INR cr) | 1,013,215 | 683,672 | 571,598 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 11.3 | 12.1 | 11.3 |
| NSE VIX | 12.6 | 13.3 | 11.7 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 24,274 | (0.2) % | 12.7 % | Energy | 12,934 | (0.3) % | 9.4 % |
| IT | 10,504 | 0.2 % | (0.8) % | Pharma | 8,902 | 3.3 % | (15.2) % |
| Metals | 3,414 | 0.5 % | 9.9 % | Finance | 10,041 | (0.2) % | 13.8 % |
| Auto | 10,571 | 0.2 % | 6.6 % | PSU | 3,323 | 0.7 % | (5.7) % |
| FMCG | 25,555 | (0.2) % | 8.1 % | Real Estate | 274 | (0.6) % | 24.9 % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Cadila Hea | 494 | 6.9 % | 11.6 % | Interglobe | 1,187 | (2.5) % | 13.8 % |
| Divi's Lab | 673 | 5.5 % | 7.3 % | Petronet L | 227 | (1.9) % | 9.5 % |
| Aurobindo | 732 | 4.8 % | 7.2 % | HCL Techno | 868 | (1.4) % | 0.1 % |
| United Spi | 2,567 | 4.0 % | 25.4 % | Adani Port | 380 | (1.3) % | 11.1 % |
| Lupin | 993 | 3.8 % | (30.8) % | Motherson | 311 | (1.2) % | 24.1 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

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