



28 Sep.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,736	(1.4) %	5.4 %
BSE SENSEX	31,160	(1.4) %	4.2 %
CNX BANK	23,813	(1.6) %	10.5 %
CNX MIDCAP	17,841	(2.3) %	2.9 %
CNX SMALLCAP	7,408	(2.3) %	4.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,341	0.3 %	12.4 %
S&P 500	2,507	0.4 %	11.0 %
FTSE 100	7,314	0.4 %	1.9 %
HANG SENG	27,642	0.5 %	24.8 %
NIKKEI	20,267	(0.3) %	3.4 %
SHANGHAI COMPOSITE	3,345	0.1 %	6.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.71	0.9 %	(2.5) %
EUR/USD	1.17	(1.0) %	10.8 %
GBP/USD	1.34	(0.7) %	8.9 %
USD/JPY	112.89	1.1 %	(2.7) %
USD/AUD	1.28	1.4 %	(6.7) %
USD/SGD	1.36	0.7 %	(4.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(0.7) %	(0.9) %
Gold(INR/10g)	29,828	(1.0) %	7.2 %
Gold Comex(USD/oz)	1,298	(1.2) %	12.2 %
SILVER(INR/1Kg)	39,502	(0.8) %	1.5 %
Aluminium(USD/MT)	2,116	(0.6) %	24.3 %
Copper(USD/MT)	6,423	0.1 %	15.2 %

**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:** New orders for US manufactured durable goods jumped by more than anticipated in the month of August. The durable goods orders soared by 1.7% in August after plunging by 6.8% in July. A report released by the National Association of Realtors on Wednesday showed a steep drop in pending home sales in the US in the month of August. NAR said its pending home sales index plunged by 2.6% to 106.3 in August from 109.1 in July. British retail sales grew the most in two years in September, the latest Distributive Trades survey from the Confederation of British Industry showed. The retail sales balance rose to 42% in September, the highest since September 2015, when the score was 49%.

**Global Equities:** US stocks edged up following the lackluster performance seen in the previous few sessions. The major averages all closed in positive territory while the tech-heavy Nasdaq outperformed its counterparts.

**Indian Economy:** The Goods and Services Tax (GST) was introduced on 1st of July, 2017. In the press release dated 29th August, 2017, it was reported that the total revenue of GST paid under different heads for the month of July, 2017 (upto 29th August) was Rs. 92,283 crore. Out of the total GST collection of Rs. 92,283 crore, the total CGST revenue was Rs. 14,894 crore, SGST revenue was Rs.22,722 crore, IGST revenue was Rs.47,469 crore (of which IGST from imports was Rs.20,964 crore) and Compensation Cess was Rs.7,198 crore (of which Rs.599 crore is Compensation Cess from imports). Many assesseees have been filing the returns for July 2017 belatedly and till 31st August, 2017 and the total GST paid for July is Rs. 94,063 crore.

**Equity Markets:** Key benchmark indices slumped as reports suggesting that Indian Army carried out a surgical strike along the Myanmar border and targeted Naga insurgent camps dampened sentiment. The Sensex settled at its lowest level in nearly three months. The Nifty hit its lowest closing level in almost seven weeks. The rupee sunk to a more than six-month low on foreign fund outflows. Indices dropped for the seventh straight session. Federal Reserve Chairwoman Janet Yellen hinting at possible hike in US interest rates increased worries of pull out of money from risky assets in emerging markets like India.

**Corporate News:** Power Grid Corporation of India said it began commercial operations of Pole II of the Champa-Kurukshetra HVDC Terminal in Chhattisgarh from 16 September, 2017. With this, all assets under the WR-NR HVDC Interconnector for IPP projects in Chhattisgarh have been commissioned. Reliance Industries (RIL) announced that its telecom unit, Reliance Jio Infocomm (Jio) and Roy Kapur Films (RKF), a leading film and media production company founded by Siddharth Roy Kapur, tied up wherein original digital video content for the Jio platform will be curated, developed, commissioned and creatively produced by Roy Kapur Films. APL Apollo Tubes entered into a joint venture (JV) with Singapore-based One to One Holdings, for manufacturing of in-line galvanized tubes. The announcement was made after market hours yesterday, 27 September 2017. Vista Pharma said its board will meet on 30 September 2017 to consider raising funds via equity shares/convertible warrants.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(253.5)	(57.3)	(7.0)
MF(INR cr)	1,300.5	577.4	575.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,879	27,976	29,936
F&O(INR cr)	1,158,706	615,352	585,186

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.2	10.6	11.2
NSE VIX	13.9	12.4	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,813	(1.6) %	10.5 %	Energy	12,809	(1.6) %	8.4 %
IT	10,544	(0.0) %	(0.5) %	Pharma	9,036	(2.8) %	(14.0) %
Metals	3,477	(1.6) %	12.0 %	Finance	9,808	(1.5) %	11.1 %
Auto	10,646	(1.6) %	7.3 %	PSU	3,027	(3.1) %	(14.2) %
FMCG	24,556	(1.3) %	3.9 %	Real Estate	264	(2.9) %	20.3 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Shriram Tr	1,050	4.3 %	(4.9) %	Divi's Lab	851	(11.4) %	35.6 %
Bharti Inf	383	1.7 %	16.1 %	Siemens	1,219	(7.8) %	(6.4) %
Interglobe	1,057	1.3 %	1.3 %	Rural Elec	152	(5.6) %	(15.5) %
Oracle Fin	3,546	0.8 %	(6.3) %	DLF	160	(5.5) %	8.9 %
TCS	2,495	0.8 %	3.5 %	Adani Port	373	(4.6) %	8.9 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Job vacancies (AUG)	28-09-2017	01:30	AUD	-	0.015
RBA's Debelle Speaks at BOE Conference, London	28-09-2017	09:00	AUD	-	-
Swift Global Payments CNY (AUG)	28-09-2017	01:00	CNY	-	0.02
ECB's Lautenschlaeger speaks in Vienna	28-09-2017	11:10	EUR	-	-
ECB's Praet speaks in Berlin	28-09-2017	08:00	EUR	-	-
Euro-Zone Business Climate Indicator (SEP)	28-09-2017	09:00	EUR	-	1.09
Euro-Zone Consumer Confidence (SEP F)	28-09-2017	09:00	EUR	-	(1.2)
Euro-Zone Economic Confidence (SEP)	28-09-2017	09:00	EUR	-	111.9
Euro-Zone Industrial Confidence (SEP)	28-09-2017	09:00	EUR	-	5.1
Euro-Zone Services Confidence (SEP)	28-09-2017	09:00	EUR	-	14.9
German Consumer Price Index (MoM) (SEP P)	28-09-2017	12:00	EUR	-	0.001
German Consumer Price Index (YoY) (SEP P)	28-09-2017	12:00	EUR	-	0.018
German GfK Consumer Confidence Survey (OCT)	28-09-2017	06:00	EUR	-	10.9
Carney Speaks at BOE Independence Conference, London	28-09-2017	08:15	GBP	-	-
GfK Consumer Confidence Survey (SEP)	28-09-2017	23:01	GBP	-	(10)
Lloyds Business Barometer (SEP)	28-09-2017	23:01	GBP	-	17
BOJ Summary of Opinions at Sept.20-21 Meeting	28-09-2017	23:50	JPY	-	-
Household Spending (YoY) (AUG)	28-09-2017	23:30	JPY	-	(0.002)
Industrial Production (MoM) (AUG P)	28-09-2017	23:50	JPY	-	(0.008)
Industrial Production (YoY) (AUG P)	28-09-2017	23:50	JPY	-	0.047
Jobless Rate (AUG)	28-09-2017	23:30	JPY	-	0.028
Job-To-Applicant Ratio (AUG)	28-09-2017	23:30	JPY	-	1.52
Large Retailers' Sales (AUG)	28-09-2017	23:50	JPY	-	(0.002)
Loans & Discounts Corp (YoY) (AUG)	28-09-2017	23:50	JPY	-	0.038
National Consumer Price Index (YoY) (AUG)	28-09-2017	23:30	JPY	-	0.004
National Consumer Price Index Ex-Fresh Food (YoY) (AUG)	28-09-2017	23:30	JPY	-	0.005
Natl CPI Ex Fresh Food, Energy (YoY) (AUG)	28-09-2017	23:30	JPY	-	0.001
Retail Trade (YoY) (AUG)	28-09-2017	23:50	JPY	-	0.019
Retail Trade Ex FMCG (YoY) (AUG)	28-09-2017	23:50	JPY	-	0.011



Tokyo Consumer Price Index (YoY) (SEP)	28-09-2017	23:30	JPY	-	0.005
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (SEP)	28-09-2017	23:30	JPY	-	0.004
Tokyo CPI Ex-Fresh Food, Energy (YoY) (SEP)	28-09-2017	23:30	JPY	-	0
Building Permits (MoM) (AUG)	28-09-2017	21:45	NZD	-	(0.007)
Advance Goods Trade Balance (AUG)	28-09-2017	12:30	USD	-	-
Continuing Claims (SEP 16)	28-09-2017	12:30	USD	-	-
Core Personal Consumption Expenditure (QoQ) (2Q T)	28-09-2017	12:30	USD	-	0.009
EIA Natural Gas Storage Change (SEP 22)	28-09-2017	14:30	USD	-	97
EIA Working Natural Gas Implied Flow (SEP 22)	28-09-2017	14:30	USD	-	97
Fed's Bostic to Speak about Careers in Economics	28-09-2017	17:30	USD	-	-
Fed's Fischer Speaks at BOE Independence Conference, London	28-09-2017	14:00	USD	-	-
Fed's George Speaks on Economy and Monetary Policy	28-09-2017	13:45	USD	-	-
Gross Domestic Product (Annualized) (2Q T)	28-09-2017	12:30	USD	-	0.03
Gross Domestic Product Price Index (2Q T)	28-09-2017	12:30	USD	-	0.01
Initial Jobless Claims (SEP 23)	28-09-2017	12:30	USD	-	-
Kansas City Fed Manf. Activity (SEP)	28-09-2017	15:00	USD	-	16
Personal Consumption (2Q T)	28-09-2017	12:30	USD	-	0.033
Retail Inventories (MoM) (AUG)	28-09-2017	12:30	USD	-	(0.002)
U.S. to Sell USD28 Bln 7-Year Notes	28-09-2017	17:00	USD	-	-
Wholesale Inventories (AUG P)	28-09-2017	12:30	USD	-	0.006

..... End of Report .....

