



29 Jun.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,551	0.6 %	3.4 %
BSE SENSEX	30,834	(0.4) %	3.7 %
CNX BANK	23,442	0.9 %	8.8 %
CNX MIDCAP	17,677	0.9 %	2.0 %
CNX SMALLCAP	7,307	1.2 %	3.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,455	0.7 %	7.9 %
S&P 500	2,441	0.9 %	8.1 %
FTSE 100	7,388	(0.6) %	2.9 %
HANG SENG	25,684	(0.6) %	16.0 %
NIKKEI	20,130	(0.5) %	2.7 %
SHANGHAI COMPOSITE	3,173	(0.6) %	1.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.55	0.0 %	(4.3) %
EUR/USD	1.14	0.6 %	7.7 %
GBP/USD	1.30	1.2 %	5.4 %
USD/JPY	112.21	0.1 %	(3.3) %
USD/AUD	1.30	(0.7) %	(4.6) %
USD/SGD	1.38	(0.4) %	(3.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	1.1 %	(14.5) %
Gold(INR/10g)	28,797	0.2 %	3.5 %
Gold Comex(USD/oz)	1,252	(0.1) %	8.2 %
SILVER(INR/1Kg)	38,802	0.7 %	(0.3) %
Aluminium(USD/MT)	1,886	1.3 %	10.8 %
Copper(USD/MT)	5,822	0.6 %	4.4 %

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: The US trade deficit narrowed in May. The international trade deficit was \$65.9 billion in May, down \$1.2 billion from \$67.1 billion in April. Exports of goods for May were \$127.1 billion, \$0.5 billion more than April exports. Imports of goods for May were \$193.0 billion, \$0.8 billion less than April imports. Pending home sales in the U.S. unexpectedly decreased for the third consecutive month in May, according to a report released by the National Association of Realtors on Wednesday. NAR said its pending home sales index fell by 0.8% to 108.5 in May. Monetary stimulus may need to be withdrawn to some extent in future, Bank of England Governor Mark Carney said Wednesday, altering his view from earlier this month when the bank left the interest rate and asset purchases unchanged.

Global Equities: US stocks recovered strongly after recent losses. With the rebound, the tech-heavy Nasdaq climbed well off its lowest closing level in a month.

Indian Economy: The Union Cabinet chaired by the Prime Minister Narendra Modi approved the recommendations of the 7th CPC on allowances with some modifications. The revised rates of the allowances shall come into effect from 1st July, 2017 and shall affect more than 48 lakh central government employees. While approving the recommendations of the 7th CPC on 29th June, 2016, the Cabinet had decided to set up the Committee on Allowances (CoA) in view of substantial changes in the existing provisions and a number of representations received. The modifications are based on suggestions made by the CoA in its Report submitted to Finance Minister on 27th April, 2017 and the Empowered Committee of Secretaries set up to screen the recommendations of 7th CPC.

Equity Markets: Local stocks witnessed modest losses amid negative global cues. The Sensex failed to hold the psychological 31,000 level which it briefly surpassed in early trade. Metal and telecom sector stocks advanced. Key indices opened on a weaker note amid initial volatility. Indices traded with small losses till early afternoon trade. Later, indices extended slide for the remaining session. The Sensex hit its lowest intraday level in almost five weeks in afternoon trade.

Corporate News: Shares of Eris Lifesciences will be listed on the bourses today, 29 June 2017. The issue price was fixed at a higher end of the IPO price band at Rs 603 per share. The company's initial public offering (IPO) received bids for 5.25 crore shares compared with 1.59 crore shares, data on NSE showed. The IPO was subscribed 3.29 times. Axis Bank announced that it has successfully issued Rs 3500 crore Basel III compliant additional tier 1 debentures through private placement to augment the tier 1 capital base. The perpetual debentures with a 5 year call are priced at a fine coupon rate of 8.75%. Wipro announced that locals now form over 50% of its US workforce. Over the past six months, the company hired over 1,600 employees by attracting and nurturing local talent to drive innovation and help transform clients' businesses into digital enterprises.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	146.1	29.2	30.2
MF(INR cr)	271.6	411.4	485.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	25,722	26,956	29,455
F&O(INR cr)	783,852	512,649	526,804

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.0	10.4	11.4
NSE VIX	12.0	11.2	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,236	0.1 %	7.8 %	Energy	11,644	(1.1) %	(1.5) %
IT	10,134	0.6 %	(4.3) %	Pharma	9,482	0.2 %	(9.7) %
Metals	2,932	1.6 %	(5.6) %	Finance	9,521	(0.2) %	7.9 %
Auto	10,583	0.1 %	6.7 %	PSU	3,307	(0.6) %	(6.2) %
FMCG	25,982	(0.8) %	9.9 %	Real Estate	262	0.8 %	19.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Pru	458	4.0 %	18.7 %	Pidilite I	782	(3.1) %	11.2 %
United Spi	2,368	3.9 %	15.7 %	Godrej Con	939	(3.1) %	10.7 %
Interglobe	1,265	3.8 %	21.3 %	Reliance I	1,399	(2.7) %	1.7 %
Tech Mahin	392	3.2 %	(13.4) %	Asian Pain	1,109	(2.2) %	1.8 %
Idea Cellu	84	2.9 %	(1.9) %	Titan Comp	507	(1.7) %	10.4 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
HIA New Home Sales (MoM) (MAY)	29-06-2017	1:00	AUD	-	0.008
Job vacancies (MAY)	29-06-2017	1:30	AUD	-	0.018
Swift Global Payments CNY (MAY)	29-06-2017	1:00	CNY	-	0.016
Euro-Zone Business Climate Indicator (JUN)	29-06-2017	9:00	EUR	-	0.9
Euro-Zone Consumer Confidence (JUN F)	29-06-2017	9:00	EUR	-	(1.3)
Euro-Zone Economic Confidence (JUN)	29-06-2017	9:00	EUR	-	109.2
Euro-Zone Industrial Confidence (JUN)	29-06-2017	9:00	EUR	-	2.8
Euro-Zone Services Confidence (JUN)	29-06-2017	9:00	EUR	-	13
German Consumer Price Index (MoM) (JUN P)	29-06-2017	12:00	EUR	-	(0.002)
German Consumer Price Index (YoY) (JUN P)	29-06-2017	12:00	EUR	-	0.015
German GfK Consumer Confidence Survey (JUL)	29-06-2017	6:00	EUR	-	10.4
GfK Consumer Confidence Survey (JUN)	29-06-2017	23:01	GBP	-	(5)
Lloyds Business Barometer (JUN)	29-06-2017	23:01	GBP	-	27
M4 Ex IOFCs 3M Annualised (MAY)	29-06-2017	8:30	GBP	-	0.056
M4 Money Supply (MoM) (MAY)	29-06-2017	8:30	GBP	-	0.012
M4 Money Supply (YoY) (MAY)	29-06-2017	8:30	GBP	-	0.082
Mortgage Approvals (MAY)	29-06-2017	8:30	GBP	-	-
Net Consumer Credit (MAY)	29-06-2017	8:30	GBP	-	-
Net Lending Sec. on Dwellings (MAY)	29-06-2017	8:30	GBP	-	-
BOJ Harada speaks in Tokyo	29-06-2017	6:30	JPY	-	-
Household Spending (YoY) (MAY)	29-06-2017	23:30	JPY	-	(0.014)
Industrial Production (MoM) (MAY P)	29-06-2017	23:50	JPY	-	0.04
Industrial Production (YoY) (MAY P)	29-06-2017	23:50	JPY	-	0.057
Jobless Rate (MAY)	29-06-2017	23:30	JPY	-	0.028
Job-To-Applicant Ratio (MAY)	29-06-2017	23:30	JPY	-	1.48
National Consumer Price Index (YoY) (MAY)	29-06-2017	23:30	JPY	-	0.004
National Consumer Price Index Ex-Fresh Food (YoY) (MAY)	29-06-2017	23:30	JPY	-	0.003
Natl CPI Ex Fresh Food, Energy (YoY) (MAY)	29-06-2017	23:30	JPY	-	0
Talent Consumer Price Index (YoY) (JUN)	29-06-2017	23:30	JPY	-	0.002



Tokyo Consumer Price Index Ex-Fresh Food (YoY) (JUN)	29-06-2017	23:30	JPY	-	0.001
Tokyo CPI Ex-Fresh Food, Energy (YoY) (JUN)	29-06-2017	23:30	JPY	-	0
ANZ Activity Outlook (JUN)	29-06-2017	1:00	NZD	-	38.3
ANZ Business Confidence (JUN)	29-06-2017	1:00	NZD	-	14.9
Building Permits (MoM) (MAY)	29-06-2017	22:45	NZD	-	(0.076)
Continuing Claims (JUN 17)	29-06-2017	12:30	USD	-	-
Core Personal Consumption Expenditure (QoQ) (1Q T)	29-06-2017	12:30	USD	-	0.021
EIA Natural Gas Storage Change (JUN 23)	29-06-2017	14:30	USD	-	61
EIA Working Natural Gas Implied Flow (JUN 23)	29-06-2017	14:30	USD	-	61
Fed's Bullard Speaks on Monetary Policy in London	29-06-2017	17:00	USD	-	-
Gross Domestic Product (Annualized) (1Q T)	29-06-2017	12:30	USD	-	0.012
Gross Domestic Product Price Index (1Q T)	29-06-2017	12:30	USD	-	0.022
Initial Jobless Claims (JUN 24)	29-06-2017	12:30	USD	-	-
Personal Consumption (1Q T)	29-06-2017	12:30	USD	-	0.006

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