



29 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,840	(0.7) %	6.5 %
BSE SENSEX	31,751	0.5 %	5.3 %
CNX BANK	24,197	(0.7) %	12.3 %
CNX MIDCAP	18,069	(0.5) %	4.2 %
CNX SMALLCAP	7,569	(0.7) %	7.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,808	(0.0) %	9.7 %
S&P 500	2,444	0.1 %	8.3 %
FTSE 100	7,401	(0.1) %	3.1 %
HANG SENG	27,863	0.1 %	25.8 %
NIKKEI	19,450	(0.0) %	(0.7) %
SHANGHAI COMPOSITE	3,363	0.9 %	7.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.91	(0.2) %	(5.2) %
EUR/USD	1.20	1.5 %	12.9 %
GBP/USD	1.29	1.0 %	5.2 %
USD/JPY	108.82	(0.8) %	(6.2) %
USD/AUD	1.26	(0.5) %	(7.8) %
USD/SGD	1.36	(0.5) %	(5.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	(1.1) %	(8.5) %
Gold(INR/10g)	29,140	0.9 %	4.8 %
Gold Comex(USD/oz)	1,297	0.2 %	12.0 %
SILVER(INR/1Kg)	39,114	1.0 %	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: China's industrial profits grew at a slower rate of 16.5% year-over-year in July, following a 19.1% spike in June, figures from the National Bureau of Statistics showed Monday. During the first seven months of this year, total profits of industrial enterprises surged 21.2% annually, down slightly from 22% gain in the January to June period. Eurozone monetary aggregate rose at a slower pace in July, the European Central Bank reported Monday. The M3 broad monetary aggregate climbed 4.5% annually, weaker than the 5% growth logged in June.

Global Equities: After a lackluster session on Friday, US stocks continued to show a lack of direction during trading on Monday. The major averages spent the day bouncing back and forth across the unchanged line.

Indian Economy: According to media reports, India Ratings and Research (Ind-Ra) anticipates commercial paper (CP) issuances may gain traction owing to the advent of the Goods and Services Tax (GST). On the other hand, tepid investment demand and excessive banking sector deposits are likely to force banks to increase their focus on capturing incipient credit demands, precisely for 'AAA' and 'AA' rated category borrowers. This could impact activities in the primary bond market. The agency believes that the implication of the GST is likely to increase working capital requirements for most of the manufacturing entities; therefore the impact is likely to be translated into higher of short-term funds requirements.

Equity Markets: Trading for the week after an extended weekend due to a holiday started on a firm note as key benchmark indices settled with modest gains. Geopolitical tensions eased after the government reportedly said India and China agreed to disengagement at Doklam area. Indices gained for the fourth straight session. After opening with modest gains, key indices held firm throughout the session.

Corporate News: IT major Infosys said that some of the promoters would participate in the upcoming share buyback of the company. The IT firm had announced a Rs 13000-crore share buyback on 19 August 2017, a day after CEO and MD Vishal Sikka resigned from the company. The company would buy back up to 11.30 crore shares aggregating up to 4.92% of the paid-up equity capital via tender route at a price of Rs 1,150. NTPC will be watched. The government will sell 5% stake in NTPC at a floor price of Rs 168 per share through a two-day offer-for-sale (OFS) beginning today, 29 August 2017, with an option to issue a similar number of shares in case of over subscription. The sale of 41.23 crore shares, or 5% equity, would fetch about Rs 7000 crore to the exchequer. ACC, Bank of Baroda, Tata Power Company and Tata Motors DVR will be excluded from the NSE Nifty 50 index, according to a media statement issued on the National Stock Exchange after market hours yesterday, 28 August 2017. At the same time, Bajaj Finance, Hindustan Petroleum Corporation (HPCL) and UPL will become part of the index. Changes will be effective from 29 September 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(86.9)	(131.5)	0.6
MF(INR cr)	1,565.9	840.3	537.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,872	30,090	30,293
F&O(INR cr)	482,462	672,494	570,707

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.3	12.1	11.3
NSE VIX	12.6	13.3	11.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,377	0.4 %	13.1 %	Energy	12,963	0.2 %	9.7 %
IT	10,592	0.8 %	0.0 %	Pharma	8,975	0.8 %	(14.6) %
Metals	3,426	0.4 %	10.3 %	Finance	10,097	0.6 %	14.4 %
Auto	10,592	0.2 %	6.8 %	PSU	3,320	(0.1) %	(5.8) %
FMCG	25,762	0.8 %	9.0 %	Real Estate	275	0.3 %	25.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Dabur Indi	313	4.2 %	11.6 %	DLF	180	(3.7) %	22.6 %
Bajaj Fin.	1,830	4.0 %	54.9 %	Dr Reddy's	2,049	(1.9) %	(25.3) %
Shree Ceme	17,565	3.4 %	2.3 %	NHPC Ltd	29	(1.8) %	(9.5) %
Divi's Lab	695	3.2 %	10.8 %	Power Grid	217	(1.7) %	10.7 %
Infosys	941	3.2 %	(6.7) %	Tata Motor	379	(1.3) %	(19.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Industrial Product Price (MoM) (JUL)	29-08-2017	12:30	CAD	-	(0.01)
Raw Materials Price Index (MoM) (JUL)	29-08-2017	12:30	CAD	-	(0.037)
French Gross Domestic Product (QoQ) (2Q P)	29-08-2017	6:45	EUR	-	0.005
French Gross Domestic Product (YoY) (2Q P)	29-08-2017	6:45	EUR	-	0.018
German GfK Consumer Confidence Survey (SEP)	29-08-2017	6:00	EUR	-	10.8
BRC Shop Price Index (YoY) (AUG)	29-08-2017	23:01	GBP	-	(0.004)
Nationwide House Prices n.s.a. (YoY) (AUG)	29-08-2017	6:00	GBP	-	0.029
Nationwide House Prices s.a. (MoM) (AUG)	29-08-2017	6:00	GBP	-	0.003
Large Retailers' Sales (JUL)	29-08-2017	23:50	JPY	-	0.002
Retail Trade (YoY) (JUL)	29-08-2017	23:50	JPY	-	0.021
Retail Trade s.a. (MoM) (JUL)	29-08-2017	23:50	JPY	-	0.002
Building Permits (MoM) (JUL)	29-08-2017	22:45	NZD	-	(0.01)
Conf. Board Expectations (AUG)	29-08-2017	14:00	USD	-	103.3
Conf. Board Present Situation (AUG)	29-08-2017	14:00	USD	-	147.8
Consumer Confidence (AUG)	29-08-2017	14:00	USD	-	121.1
S&P CoreLogic CS 20-City (MoM) SA (JUN)	29-08-2017	13:00	USD	-	0.001
S&P/Case-Shiller Composite-20 (YoY) (JUN)	29-08-2017	13:00	USD	-	0.0569
S&P/Case-Shiller Home Price Index (JUN)	29-08-2017	13:00	USD	-	198.97
S&P/Case-Shiller US Home Price Index (JUN)	29-08-2017	13:00	USD	-	190.61
S&P/Case-Shiller US Home Price Index (YoY) (JUN)	29-08-2017	13:00	USD	-	0.0558
U.S. to Sell 4-Week Bills	29-08-2017	15:30	USD	-	-
U.S. to Sell USD28 Bln 7-Year Notes	29-08-2017	17:00	USD	-	-

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