



29 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,769	0.3 %	5.7 %
BSE SENSEX	31,282	0.4 %	4.6 %
CNX BANK	24,008	0.8 %	11.4 %
CNX MIDCAP	17,941	0.6 %	3.5 %
CNX SMALLCAP	7,481	1.0 %	5.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,381	0.2 %	12.6 %
S&P 500	2,510	0.1 %	11.2 %
FTSE 100	7,323	0.1 %	2.0 %
HANG SENG	27,422	(0.8) %	23.8 %
NIKKEI	20,363	0.5 %	3.9 %
SHANGHAI COMPOSITE	3,340	(0.2) %	6.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.51	0.1 %	(2.8) %
EUR/USD	1.18	(0.0) %	11.1 %
GBP/USD	1.34	(0.2) %	9.1 %
USD/JPY	112.58	0.2 %	(2.9) %
USD/AUD	1.27	0.5 %	(6.8) %
USD/SGD	1.36	(98.2) %	(5.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	0.5 %	(0.4) %
Gold(INR/10g)	29,667	(0.5) %	6.7 %
Gold Comex(USD/oz)	1,286	(0.9) %	11.1 %
SILVER(INR/1Kg)	39,311	(0.5) %	1.0 %
Aluminium(USD/MT)	2,117	0.0 %	24.4 %
Copper(USD/MT)	6,426	0.0 %	15.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	0.1 %	(0.2) %

Global Economy: Economic activity in the US expanded by slightly more than previously estimated in the second quarter, the Commerce Department revealed in a report on Thursday. The report said gross domestic product grew by 3.1% in the second quarter compared to the previously estimated 3% growth. Eurozone economic confidence reached its highest level in more than a decade in September. The economic sentiment index rose to 113.0 in September from 111.9 in August, survey data from the European Commission showed Thursday. This was the highest since June 2007, when the reading was 113.1. The indicator firmed in September on the back of higher industry, retail trade and construction confidence.

Global Equities: US stocks saw choppy moves after the recent recovery. However, supportive US GDP figures pushed the S&P index to a record high.

Indian Economy: The Rural Development Minister Narendra Singh Tomar asserted that there is a steep hike in the budget of the Ministry and allocation to all its flagship schemes has gone up considerably. Briefing the media here, the Minister said that the budget of the Ministry in 2012-13 was Rs 50,161 crore (0.50% of GDP) but in 2016-17, the budget has increased to Rs 95,096 crore, which is 0.63 percent of GDP. Referring to the main flagship scheme of MGNREGA, he said the budget for the rural job scheme has gone up considerably from about Rs 37,000 crore in 2011-12 to about 58,000 Crore in 2016-17.

Equity Markets: Key benchmark indices settled with small gains after rangebound session of trade as firmness in European stocks supported gains on the domestic bourses. Bargain hunting emerged after indices witnessed last seven days of losses. A bout of volatility was also witnessed as near month derivatives contracts expired. Markets moved up from a three month low.

Corporate News: Infosys announced that Mediterranean Bank, one of the leading Maltese banks, has gone live on the Finacle Lending Module. The bank has replaced its existing lending solution with Finacle to provide a unified, consistent platform for its corporate customers. Infosys Finacle is the industry-leading universal banking solution from EdgeVerve Systems, a wholly owned subsidiary of Infosys. NTPC said it will start commercial operations of 500 MW unit at Feroze Gandhi Uchahar Thermal Power Station from 30 September 2017. With this, the commercial capacity of NTPC would become 43392 MW and that of NTPC Group would become 50608 MW. Titan Company announced that its operational performance in second quarter was close to expectation. The July-September quarter is normally a comparably weaker quarter every year due to the lack of festivals and certain inauspicious periods. Having said that, the market share gain in the jewellery business continued unabated despite some slowdown in the month of July as a consequence of the advancement of sales that we saw in the second half of June (in anticipation of GST), noted the company.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(78.9)	(58.4)	(7.6)
MF(INR cr)	1,424.1	622.0	582.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	41,402	28,647	30,029
F&O(INR cr)	1,500,675	659,618	592,629

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.9	10.5	11.2
NSE VIX	13.2	12.4	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,008	0.8 %	11.4 %	Energy	12,722	(0.7) %	7.6 %
IT	10,522	(0.2) %	(0.7) %	Pharma	9,112	0.8 %	(13.3) %
Metals	3,502	0.7 %	12.7 %	Finance	9,918	1.1 %	12.4 %
Auto	10,684	0.4 %	7.7 %	PSU	3,042	0.5 %	(13.7) %
FMCG	24,725	0.7 %	4.6 %	Real Estate	266	1.1 %	21.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Container	1,319	4.5 %	30.5 %	Asian Pain	1,130	(2.6) %	3.7 %
Ashok Leyl	117	4.1 %	38.8 %	Siemens	1,189	(2.5) %	(8.7) %
ACC	1,646	3.5 %	12.6 %	ICICI Pru	381	(2.5) %	(1.0) %
United Bre	851	3.3 %	11.3 %	Titan Comp	576	(2.4) %	25.3 %
Dr Reddy's	2,375	3.1 %	(13.4) %	A B B	1,409	(2.2) %	6.6 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Sector Credit (MoM) (AUG)	29-09-2017	01:30	AUD	-	0.005
Private Sector Credit (YoY) (AUG)	29-09-2017	01:30	AUD	-	0.053
Gross Domestic Product (MoM) (JUL)	29-09-2017	12:30	CAD	-	0.003
Gross Domestic Product (YoY) (JUL)	29-09-2017	12:30	CAD	-	0.043
Industrial Product Price (MoM) (AUG)	29-09-2017	12:30	CAD	-	(0.015)
Raw Materials Price Index (MoM) (AUG)	29-09-2017	12:30	CAD	-	(0.006)
KOF Leading Indicator (SEP)	29-09-2017	07:00	CHF	-	104.1
Caixin China PMI Mfg (SEP)	29-09-2017	01:45	CNY	-	51.6
ECB's Draghi, BOE's Carney in dialog in London	29-09-2017	14:15	EUR	-	-
Euro-Zone Consumer Price Index - Core (YoY) (SEP A)	29-09-2017	09:00	EUR	-	0.012
Euro-Zone Consumer Price Index Estimate (YoY) (SEP)	29-09-2017	09:00	EUR	-	0.015
German Retail Sales (MoM) (AUG)	29-09-2017	06:00	EUR	-	(0.012)
German Retail Sales (YoY) (AUG)	29-09-2017	06:00	EUR	-	0.027
German Unemployment Change (SEP)	29-09-2017	07:55	EUR	-	-
German Unemployment Rate s.a. (SEP)	29-09-2017	07:55	EUR	-	0.057
BOE's Broadbent Speaks at Conference in London	29-09-2017	12:30	GBP	-	-
BOE's Cunliffe speaks at conference in Brussels	29-09-2017	12:00	GBP	-	-
Current Account (Pounds) (2Q)	29-09-2017	08:30	GBP	-	-
Gross Domestic Product (QoQ) (2Q F)	29-09-2017	08:30	GBP	-	0.003
Gross Domestic Product (YoY) (2Q F)	29-09-2017	08:30	GBP	-	0.017
IMF's Lagarde Speaks at BOE Conference, London	29-09-2017	10:30	GBP	-	-
Index of Services (3Mo3M) (JUL)	29-09-2017	08:30	GBP	-	0.005
Index of Services (MoM) (JUL)	29-09-2017	08:30	GBP	-	0.004
M4 Ex IOFCs 3M Annualised (AUG)	29-09-2017	08:30	GBP	-	0.033
M4 Money Supply (MoM) (AUG)	29-09-2017	08:30	GBP	-	0.005
M4 Money Supply (YoY) (AUG)	29-09-2017	08:30	GBP	-	0.044
Mortgage Approvals (AUG)	29-09-2017	08:30	GBP	-	-
Nationwide House Prices n.s.a. (YoY) (SEP)	29-09-2017	06:00	GBP	-	0.021
Nationwide House Prices n.s.a. (MoM) (SEP)	29-09-2017	06:00	GBP	-	(0.001)



Net Consumer Credit (AUG)	29-09-2017	08:30	GBP	-	-
Net Lending Sec. on Dwellings (AUG)	29-09-2017	08:30	GBP	-	-
Total Business Investment (QoQ) (2Q F)	29-09-2017	08:30	GBP	-	0
Total Business Investment (YoY) (2Q F)	29-09-2017	08:30	GBP	-	0
Annualized Housing Starts (AUG)	29-09-2017	05:00	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	29-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	29-09-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	29-09-2017	01:10	JPY	-	-
Construction Orders (YoY) (AUG)	29-09-2017	05:00	JPY	-	0.149
Housing Starts (YoY) (AUG)	29-09-2017	05:00	JPY	-	(0.023)
Vehicle Production (YoY) (AUG)	29-09-2017	04:00	JPY	-	0.014
Baker Hughes U.S. Rig Count (SEP 29)	29-09-2017	17:00	USD	-	935
Chicago Purchasing Manager (SEP)	29-09-2017	13:45	USD	-	58.9
Fed's Harker Speaks at Fintech Event on Consumers and Banking	29-09-2017	15:00	USD	-	-
PCE Deflator (MoM) (AUG)	29-09-2017	12:30	USD	-	0.001
Personal Consumption Expenditure Core (MoM) (AUG)	29-09-2017	12:30	USD	-	0.001
Personal Consumption Expenditure Core (YoY) (AUG)	29-09-2017	12:30	USD	-	0.014
Personal Consumption Expenditure Deflator (YoY) (AUG)	29-09-2017	12:30	USD	-	0.014
Personal Income (AUG)	29-09-2017	12:30	USD	-	0.004
Personal Spending (AUG)	29-09-2017	12:30	USD	-	0.003
Real Personal Spending (AUG)	29-09-2017	12:30	USD	-	0.002
U. of Mich. 1 Yr Inflation (SEP F)	29-09-2017	14:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (SEP F)	29-09-2017	14:00	USD	-	0.026
U. of Mich. Current Conditions (SEP F)	29-09-2017	14:00	USD	-	113.9
U. of Mich. Expectations (SEP F)	29-09-2017	14:00	USD	-	83.4
U. of Michigan Confidence (SEP F)	29-09-2017	14:00	USD	-	95.3

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