



30 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,796	(1.2) %	6.0 %
BSE SENSEX	31,388	(1.1) %	4.9 %
CNX BANK	24,129	(1.0) %	12.0 %
CNX MIDCAP	17,956	(1.1) %	3.6 %
CNX SMALLCAP	7,522	(1.3) %	6.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,865	0.3 %	10.0 %
S&P 500	2,446	0.1 %	8.3 %
FTSE 100	7,337	(0.9) %	2.2 %
HANG SENG	27,765	(0.4) %	25.3 %
NIKKEI	19,363	(0.5) %	(1.2) %
SHANGHAI COMPOSITE	3,365	0.1 %	7.3 %

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)	47	(2.7) %	(11.0) %
Gold(INR/10g)	29,140	0.9 %	4.8 %
Gold Comex(USD/oz)	1,323	2.0 %	14.3 %
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	2.1	(0.0) %	(0.3) %

Global Economy: G20 countries' international merchandise trade increased for a fifth successive quarter during the three months to June, but the pace of growth slowed, data from the Organisation for Economic Co-operation and Development showed Tuesday. On a seasonally adjusted basis and expressed in current US dollars, G20 export growth slowed to 1.4% in the second quarter from 3.4% in the first three months of the year, the Paris-based think tank said. The pace of growth in imports more than halved to 1.7% from 4.2%. G20 merchandise trade remains around 10% below the recent highs in 2014, the OECD said. German consumer confidence is set to strengthen in September, survey data from the market research group GfK showed. The forward-looking consumer sentiment index rose to 10.9 in September from 10.8 in August. The index gained for the fifth successive month and the latest reading was the highest since October 2001.

Global Equities: US stocks shrugged off the North Korea tensions amid decent buying support in tech counters. Apple shares hit an all-time high.

Indian Economy: The total revenue of Goods and Services Tax (GST) paid under different heads upto 29th August, 2017 is Rs.92,283 crore, according to a latest official update yesterday. The total CGST revenue is Rs.14,894 crore, SGST revenue is Rs.22,722 crore, IGST revenue is Rs.47,469 crore (of which IGST from imports is Rs.20,964 crore) and Cess is Rs.7,198 crore (of which Rs.599 crore is Compensation Cess from imports).

Equity Markets: Key benchmark indices dropped over 1% as sharp drop in European stocks and subdued Asian stocks weighed on sentiment on the domestic bourses. Market sentiment was dull amid geopolitical tensions in the aftermath of North Korea firing a missile over northern Japan. All the nineteen sectoral indices on BSE were in the red. The Sensex and the Nifty hit lowest closing level in a week. Both these indices snapped four-day winning streak.

Corporate News: Software major Infosys Founder N.R. Narayana Murthy strongly rebutted the personal attacks on him by the previous Board of directors. Government will announce the new industrial policy in October this year, seeking to make India a manufacturing hub by promoting 'Make in India' and addressing the issue of slower job creation. Commerce and industry minister Nirmala Sitharaman will hold talks with stakeholders, including industry captains, think tanks and state governments in Chennai, Guwahati and Mumbai to finalise the policy. Metals and mining counters would be in focus today as COMEX Copper soared to fresh two and half year highs.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	15.1	(122.9)	0.8
MF(INR cr)	1,565.9	840.3	537.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,401	29,948	30,265
F&O(INR cr)	728,961	675,466	572,274

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.3	12.1	11.3
NSE VIX	13.5	13.3	11.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,129	(1.0) %	12.0 %	Energy	12,749	(1.7) %	7.9 %
IT	10,506	(0.8) %	(0.8) %	Pharma	8,865	(1.2) %	(15.6) %
Metals	3,389	(1.1) %	9.1 %	Finance	9,977	(1.2) %	13.0 %
Auto	10,504	(0.8) %	5.9 %	PSU	3,280	(1.2) %	(7.0) %
FMCG	25,530	(0.9) %	8.0 %	Real Estate	272	(0.9) %	24.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
JSW Steel	247	1.0 %	30.7 %	Bajaj Fin.	1,773	(3.1) %	50.1 %
Tech Mahin	432	0.9 %	(4.7) %	Bank of Ba	140	(2.9) %	(18.8) %
DLF	182	0.8 %	23.7 %	NTPC	168	(2.8) %	2.3 %
H P C L	467	0.8 %	35.1 %	Hindalco I	227	(2.7) %	17.4 %
Cummins In	902	0.8 %	(6.2) %	Idea Cellu	87	(2.7) %	2.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (JUL)	30-08-2017	1:30	AUD	-	0.109
Building Approvals (YoY) (JUL)	30-08-2017	1:30	AUD	-	(0.023)
Construction Work Done (2Q)	30-08-2017	1:30	AUD	-	(0.007)
Current Account (BoP) (Canadian dollar) (2Q)	30-08-2017	12:30	CAD	-	-
Credit Suisse Survey Expectations (AUG)	30-08-2017	8:00	CHF	-	34.7
KOF Leading Indicator (AUG)	30-08-2017	7:00	CHF	-	106.8
UBS Consumption Indicator (JUL)	30-08-2017	6:00	CHF	-	1.38
Euro-Zone Business Climate Indicator (AUG)	30-08-2017	9:00	EUR	-	1.05
Euro-Zone Consumer Confidence (AUG F)	30-08-2017	9:00	EUR	-	(1.5)
Euro-Zone Economic Confidence (AUG)	30-08-2017	9:00	EUR	-	111.2
Euro-Zone Industrial Confidence (AUG)	30-08-2017	9:00	EUR	-	4.5
Euro-Zone Services Confidence (AUG)	30-08-2017	9:00	EUR	-	14.1
German Consumer Price Index (MoM) (AUG P)	30-08-2017	12:00	EUR	-	0.004
German Consumer Price Index (YoY) (AUG P)	30-08-2017	12:00	EUR	-	0.017
BOE's Charlotte Gerken speaks in Edinburgh	30-08-2017	9:45	GBP	-	-
GfK Consumer Confidence Survey (AUG)	30-08-2017	23:01	GBP	-	(12)
Lloyds Business Barometer (AUG)	30-08-2017	23:01	GBP	-	30
M4 Ex IOFCs 3M Annualised (JUL)	30-08-2017	8:30	GBP	-	0.054
M4 Money Supply (MoM) (JUL)	30-08-2017	8:30	GBP	-	(0.002)
M4 Money Supply (YoY) (JUL)	30-08-2017	8:30	GBP	-	0.053
Mortgage Approvals (JUL)	30-08-2017	8:30	GBP	-	-
Net Consumer Credit (JUL)	30-08-2017	8:30	GBP	-	-
Net Lending Sec. on Dwellings (JUL)	30-08-2017	8:30	GBP	-	-
BOJ Outright Bond Purchase 10~25 Years	30-08-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	30-08-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	30-08-2017	1:10	JPY	-	-
Foreign Buying Japan Bonds (Yen) (AUG 25)	30-08-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (AUG 25)	30-08-2017	23:50	JPY	-	-
Industrial Production (MoM) (JUL)	30-08-2017	23:50	IND	-	0.002



Industrial Production (YoY) (JUL P)	30-08-2017	23:50	JPY	-	0.055
Japan Buying Foreign Bonds (Yen) (AUG 25)	30-08-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 25)	30-08-2017	23:50	JPY	-	-
Loans & Discounts Corp (YoY) (JUL)	30-08-2017	23:50	JPY	-	0.041
Small Business Confidence (AUG)	30-08-2017	5:00	JPY	-	50
ADP Employment Change (AUG)	30-08-2017	12:15	USD	-	-
Core Personal Consumption Expenditure (QoQ) (2Q S)	30-08-2017	12:30	USD	-	0.009
DOE Cushing OK Crude Inventory (AUG 25)	30-08-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 25)	30-08-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (AUG 25)	30-08-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (AUG 25)	30-08-2017	14:30	USD	-	-
Fed's Powell Speaks at Large-Bank Directors Conference	30-08-2017	13:15	USD	-	-
Gross Domestic Product (Annualized) (2Q S)	30-08-2017	12:30	USD	-	0.026
Gross Domestic Product Price Index (2Q S)	30-08-2017	12:30	USD	-	0.01
MBA Mortgage Applications (AUG 25)	30-08-2017	11:00	USD	-	(0.005)
Personal Consumption (2Q S)	30-08-2017	12:30	USD	-	0.028

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