



30 Oct.2017

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 10,323 | (0.2) % | 11.7 % |
| BSE SENSEX | 33,157 | 0.0 % | 10.9 % |
| CNX BANK | 24,840 | (0.7) % | 15.3 % |
| CNX MIDCAP | 19,341 | (0.0) % | 11.6 % |
| CNX SMALLCAP | 8,372 | 0.2 % | 18.4 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|-------|--------|
| DOW JONES | 23,434 | 0.1 % | 17.9 % |
| S&P 500 | 2,581 | 0.8 % | 14.3 % |
| FTSE 100 | 7,505 | 0.3 % | 4.6 % |
| HANG SENG | 28,439 | 0.8 % | 28.4 % |
| NIKKEI | 22,008 | 1.2 % | 12.3 % |
| SHANGHAI COMPOSITE | 3,417 | 0.3 % | 9.0 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 65.05 | 0.4 % | (3.5) % |
| EUR/USD | 1.16 | (0.2) % | 9.5 % |
| GBP/USD | 1.31 | (0.0) % | 6.7 % |
| USD/JPY | 113.66 | (0.5) % | (2.0) % |
| USD/AUD | 1.30 | (0.5) % | (4.8) % |
| USD/SGD | 1.36 | (0.2) % | (4.6) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 54 | 2.4 % | 3.0 % |
| Gold(INR/10g) | 29,258 | (0.5) % | 5.2 % |
| Gold Comex(USD/oz) | 1,275 | 0.5 % | 10.2 % |
| SILVER(INR/1Kg) | 38,705 | (1.2) % | (0.6) % |
| Aluminium(USD/MT) | 2,119 | (2.6) % | 24.5 % |
| Copper(USD/MT) | 6,831 | (1.9) % | 22.6 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.0 | 0.0 % | (0.2) % |
| 10 Y GSec US 10 | 2.4 | (0.0) % | (0.0) % |

Global Economy: Economic growth in the US slowed modestly in the third quarter but stayed above expectations. The real gross domestic product jumped by 3% in third quarter after adding 3.1% in second quarter. The Commerce Department said the stronger than expected GDP growth reflected positive contributions from consumer spending, private inventory investment, non-residential fixed investment, exports, and federal government spending. Consumer sentiment in the U.S. improved by slightly less than initially estimated in the month of October, the University of Michigan revealed in a report on Friday. The report said the consumer sentiment index for October was downwardly revised to 100.7 from 101.1. Trade will remain the main engine of growth for the global economy but it needs to evolve with respect to emerging technology, business and policy innovation. The export-led growth strategy will yield results only when the surpluses generated from such growth are deployed for public good. This was stated by Mukhisa Kituyi, Secretary-General, United Nations Conference on Trade and Development (UNCTAD).

Global Equities: US Tech stocks stole the show on Friday. After ending the previous session mixed, stocks saw good buying with NASDAQ spiking more than 2% on the day. With the upward move on the day, the Nasdaq and the S&P 500 climbed to new record closing highs.

Indian Economy: The BharatNet project, which aims to deploy high-speed optical fibre cables across rural areas of the country, has now reached 83,000 gram panchayats, Aruna Sundararajan, Secretary, Department of Telecommunications, Government of India, said. Ms Sundararajan said that by December this year the first phase of BharatNet will be complete. This would provide 100,000 gram panchayats with broadband connectivity by laying underground optic fibre cable lines. The DoT is aggressively monitoring the prestigious BharatNet initiative that aims to provide Internet connectivity to 2.5 lakh gram panchayats or village blocks by March 2019. The entire project, when complete, is expected to give a fillip to reaching out e-commerce services, including e governance, education and television services to far flung areas of the country.

Equity Markets: Key indices settled near the flat line in last session after witnessing intraday volatility as Sensex closed with tiny gains while Nifty settled with small losses. Firmness in global stocks provided support to indices. The Sensex settled at record closing high. The Sensex had hit record intraday high as well in today's session. Nifty also had hit its record intraday high. The Sensex gained for the fifth straight day. The Nifty snapped four-day winning streak.

Corporate News: India's largest private lender ICICI Bank witnessed improvement in asset quality during the second quarter of FY18. In Q1 of FY18, the bank's net NPAs were the lowest in the last seven quarters at Rs 25,306 crore. The Q2 net NPAs stood even lower at Rs 24,130 crore. Despite a 34% drop in net profit at Rs 2,058 crore from a year ago, the bank saw its gross non-performing assets (NPAs) in the three month period July-September decreased even as it spiked from a year-ago period. Energy major Oil and Natural Gas Corp (ONGC) reported a marginal rise in its September quarter net profit at Rs 5,130 crore against Rs 4,975 crore that the company posted during the same quarter last year. The state-run firm reported a revenue rise of 3% at Rs 18,964.9 crore against Rs 18,395 crore year on year. On an operating level, the earnings before interest, taxes, depreciation and amortisation (EBITDA) was up 0.4% at Rs 9,136.2 crore against Rs 9,099.9 crore in the previous year, while the operating margin was slightly lower at 48.17% versus 49.47%.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 213.0 | 16.6 | (8.7) |
| MF(INR cr) | 691.4 | 591.5 | 617.1 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 42,537 | 33,791 | 31,080 |
| F&O(INR cr) | 341,329 | 690,231 | 603,348 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 9.8 | 10.1 | 11.0 |
| NSE VIX | 11.5 | 11.6 | 11.8 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 24,840 | (0.7) % | 15.3 % | Energy | 14,387 | (1.3) % | 21.7 % |
| IT | 10,862 | (0.2) % | 2.5 % | Pharma | 9,650 | 2.4 % | (8.1) % |
| Metals | 3,945 | (0.2) % | 27.0 % | Finance | 10,179 | 0.2 % | 15.3 % |
| Auto | 11,318 | 0.9 % | 14.1 % | PSU | 3,821 | (4.2) % | 8.4 % |
| FMCG | 25,815 | 0.7 % | 9.2 % | Real Estate | 290 | (0.5) % | 32.4 % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| United Spi | 3,026 | 17.5 % | 47.8 % | Bharti Inf | 419 | (8.1) % | 27.0 % |
| Adani Port | 432 | 4.3 % | 26.3 % | Punjab Nat | 197 | (7.9) % | 31.1 % |
| Bajaj Fin. | 1,819 | 4.1 % | 53.9 % | Yes Bank | 307 | (7.3) % | (0.2) % |
| S A I L | 80 | 3.9 % | 26.7 % | Bank of Ba | 174 | (6.1) % | 1.2 % |
| Rural Elec | 173 | 3.8 % | (3.6) % | H P C L | 456 | (5.2) % | 31.9 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

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