



31 Jul.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,015	(0.1) %	8.4 %
BSE SENSEX	32,310	(0.2) %	8.0 %
CNX BANK	24,811	(0.4) %	15.1 %
CNX MIDCAP	18,469	0.5 %	6.6 %
CNX SMALLCAP	7,803	0.6 %	10.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,830	0.2 %	9.8 %
S&P 500	2,472	(0.1) %	9.5 %
FTSE 100	7,368	(1.0) %	2.7 %
HANG SENG	26,979	(0.6) %	21.8 %
NIKKEI	19,960	(0.6) %	1.9 %
SHANGHAI COMPOSITE	3,253	0.1 %	3.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.15	0.1 %	(4.8) %
EUR/USD	1.18	0.6 %	10.9 %
GBP/USD	1.31	0.4 %	6.8 %
USD/JPY	110.69	(0.4) %	(4.6) %
USD/AUD	1.25	(0.2) %	(8.5) %
USD/SGD	1.36	(0.2) %	(5.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	1.4 %	(5.0) %
Gold(INR/10g)	28,443	0.4 %	2.3 %
Gold Comex(USD/oz)	1,276	0.9 %	10.2 %
SILVER(INR/1Kg)	37,901	0.4 %	(2.6) %
Aluminium(USD/MT)	1,892	(1.6) %	11.2 %
Copper(USD/MT)	6,283	(0.7) %	12.7 %

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	(0.0) %	(0.2) %

Global Economy: In its first (preliminary) estimate of the US GDP for the second quarter of 2017, the Bureau of Economic Analysis (BEA) reported that the US economy was growing at a +2.56% annual rate, up +1.14% from a downward revised first quarter. Consumer spending rebounded, growing at a +1.93% annualized rate during the quarter, up +1.18% from the prior quarter and very similar to the fourth quarter of 2016. The inventory contraction of the prior quarter essentially disappeared (-0.02%), as did the previous robust growth in commercial fixed investment (at only +0.36%). Governmental spending rose slightly (+0.12%), reversing the prior quarter's contraction, and the growth rates for both exports (+0.48%) and imports (-0.31%) moderated. Eurozone economic confidence strengthened unexpectedly in July to near a decade-high, survey data from the European Commission showed Friday. The economic sentiment index rose slightly to 111.2 in July from 111.1 in June. The score was forecast to fall to 110.8. This was the highest score since the 2007 financial crisis.

Global Equities: The major US averages climbed well off their early lows, with the Dow turning positive on sustained buying.

Indian Economy: The total sown area as on 28th July 2017, as per reports received from States, stands at 791.34 lakh hectare as compared to 765.79 lakh hectare at this time last year. This marks an increase of 4%. It is reported that rice has been sown in 216.23 lakh ha, up 2.26%, pulses in 114.88 lakh ha, coarse cereals in 150.19 lakh ha, up 3.40%, sugarcane in 49.15 lakh hectare, up 8.73% and cotton in 111.55 lakh ha, up 21%. Oilseeds acreage is down though, falling by nearly 9%.

Equity Markets: Key benchmark indices closed the session with small losses. The Nifty closed above the 10,000 mark. Key indices declined in early trade on weak global cues. Later, indices hovered with modest losses till mid-afternoon trade. Indices pared intraday losses towards the closing of the session. Bank stocks were mixed. ICICI Bank declined after reporting weak Q1 results. ITC edged higher after reporting decent Q1 numbers. Dr Reddy's Laboratories slumped, extending previous sessions' losses triggered by company reporting weak Q1 results.

Corporate News: Larsen & Toubro (L&T) on Friday reported a 46% YoY rise in consolidated profit at Rs 893 crore for the June quarter. The engineering and construction major had reported Rs 610 crore profit in the same quarter last year. The company said its gross revenue rose around 10% to Rs 23,990 crore for June quarter. The Minister for Communications Manoj Sinha said that as per information provided by Telecom Regulatory Authority of India (TRAI), there were 422.19 million broadband subscribers and the internet penetration (internet subscriber per 100 populations) was 32.86% in the country as on 31st March 2017. In a written reply to a question in the Rajya Sabha, he said that the National Telecom Policy-2012 envisages 600 million broadband connections by the year 2020.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	380.4	30.6	29.9
MF(INR cr)	(169.4)	427.9	473.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,140	32,871	30,313
F&O(INR cr)	375,568	592,690	550,952

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.3	10.3	11.1
NSE VIX	11.1	11.2	11.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,811	(0.4) %	15.1 %	Energy	12,671	0.1 %	7.2 %
IT	10,699	0.8 %	1.0 %	Pharma	9,673	(2.1) %	(7.9) %
Metals	3,207	(1.3) %	3.3 %	Finance	10,168	0.0 %	15.2 %
Auto	10,935	0.1 %	10.2 %	PSU	3,592	0.7 %	1.9 %
FMCG	26,034	0.2 %	10.1 %	Real Estate	281	(0.2) %	28.3 %

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>
Ashok Leyl	109	4.2 %	30.1 %	Dr Reddy's	2,465	(5.9) %	(10.2) %
Siemens	1,446	4.0 %	11.1 %	Lupin	1,064	(4.2) %	(25.8) %
Havells In	478	3.6 %	2.0 %	Sun Pharma	551	(3.7) %	(20.5) %
Interglobe	1,286	3.4 %	23.3 %	ICICI Bank	296	(3.6) %	13.6 %
HD F C	1,785	3.3 %	16.4 %	Hindalco I	216	(2.4) %	11.5 %

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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