



31 Aug.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,873	(0.1) %	6.9 %
BSE SENSEX	31,646	0.8 %	5.6 %
CNX BANK	24,245	(0.3) %	12.5 %
CNX MIDCAP	18,249	0.2 %	5.3 %
CNX SMALLCAP	7,700	0.6 %	8.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,892	0.1 %	10.1 %
S&P 500	2,458	0.5 %	8.8 %
FTSE 100	7,365	0.4 %	2.6 %
HANG SENG	28,095	1.2 %	26.8 %
NIKKEI	19,507	0.7 %	(0.4) %
SHANGHAI COMPOSITE	3,364	(0.1) %	7.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.00	(0.0) %	(5.1) %
EUR/USD	1.19	(0.8) %	12.1 %
GBP/USD	1.29	(0.1) %	5.0 %
USD/JPY	110.51	0.7 %	(4.7) %
USD/AUD	1.27	1.1 %	(7.5) %
USD/SGD	1.36	0.3 %	(5.0) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	(1.0) %	(12.2) %
Gold(INR/10g)	29,601	(0.1) %	6.4 %
Gold Comex(USD/oz)	1,308	(0.8) %	13.0 %
SILVER(INR/1Kg)	39,776	(0.2) %	2.2 %
Aluminium(USD/MT)	2,067	(1.2) %	21.4 %
Copper(USD/MT)	6,755	(0.6) %	21.2 %

**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:** US economic activity expanded by more than previously estimated in the second quarter. The Commerce Department said gross domestic product jumped by 3% in the second quarter compared to the previously estimated 2.6%. Private sector employment in the US increased by more than anticipated in the month of August, according to a report released by payroll processor ADP on Wednesday. ADP said private sector employment jumped by 237,000 jobs in August following an upwardly revised increase of 201,000 jobs in July.

**Global Equities:** US stocks edged up on Wednesday, adding to the gains posted in the previous session as strong economic cues provided good support.

**Indian Economy:** The Reserve Bank of India has revealed in its annual report that Rs 15.28 lakh crore, or 99 per cent of the Rs 15.44 lakh crore scrapped currency notes, came back into the system after demonetisation. Only Rs 16,000 crore of demonetised currency was not deposited with banks, according to data in the Reserve Bank of India's annual report. The report also said that only about 89 million units of the banned Rs 1,000 notes, worth Rs 8,900 crore, didn't come back into the system.

**Equity Markets:** Key benchmark indices logged modest gains in a steady session of trade led by index heavyweights Reliance Industries, HDFC and HDFC Bank. Positive global stocks boosted sentiment on domestic bourses. Domestic stocks saw a gap-up opening triggered by mostly positive Asian stocks. Key indices held firm till early afternoon trade. Stocks trimmed gains in mid-afternoon trade. Indices hovered in positive zone in late trade.

**Corporate News:** Reliance Industries (RIL) said it will make an offer for issuing non-convertible debentures (NCDs) worth Rs 2500 crore next week. The net proceeds of the issue will be utilised inter-alia for refinancing of existing borrowings and for any other purpose in the ordinary course of business, it said. Meanwhile, RIL said it fixed 9 September 2017 as the record date for the proposed 1:1 bonus issue of the company. Wipro said it has fixed 15 September 2017 as the record date for the purpose of determining the entitlement and the names of equity shareholders who are eligible to participate in share buyback. ONGC said that its board of directors considered the proposal for acquisition of 51.11% of share of HPCL from the Government of India and given the 'in principle approval' for the same. Further, the board has constituted a committee of directors to examine various aspects of the said proposal and to provide its recommendations to the board of director. NTPC will be watched after the government received bids for 7% stake in NTPC, which will fetch about Rs 9100 crore to the exchequer. At the end of the two-day offer for sale (OFS), the government retained oversubscription it had received from institutional investors after retail investors bid for only 73% of the quota allocated for them.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	34.1	(114.2)	1.1
MF(INR cr)	447.3	802.7	536.3

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	25,748	29,738	30,220
F&O(INR cr)	730,519	678,218	573,825

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.2	12.0	11.3
NSE VIX	12.9	13.3	11.7

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,309	0.7 %	12.8 %	Energy	12,993	1.9 %	9.9 %
IT	10,493	(0.1) %	(0.9) %	Pharma	8,908	0.5 %	(15.2) %
Metals	3,478	2.6 %	12.0 %	Finance	10,071	1.0 %	14.1 %
Auto	10,572	0.7 %	6.6 %	PSU	3,282	0.1 %	(6.9) %
FMCG	25,758	0.9 %	9.0 %	Real Estate	277	1.7 %	26.3 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
JSW Steel	259	4.9 %	37.1 %	Tech Mahin	426	(1.4) %	(6.0) %
I O C L	453	4.2 %	18.8 %	M & M	1,358	(1.4) %	5.6 %
Container	1,311	4.1 %	29.7 %	Oracle Fin	3,425	(0.9) %	(9.5) %
H P C L	486	4.1 %	40.6 %	Torrent Ph	1,210	(0.6) %	(19.6) %
Hindalco I	236	4.0 %	22.1 %	Cipla	566	(0.4) %	(4.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Manufacturing Index (AUG)	31-08-2017	23:30	AUD	-	56
Commonwealth Bank Australia PMI Mfg (AUG)	31-08-2017	23:00	AUD	-	54.4
HIA New Home Sales (MoM) (JUL)	31-08-2017	1:00	AUD	-	(0.069)
Private Capital Expenditure (2Q)	31-08-2017	1:30	AUD	-	0.003
Private Sector Credit (MoM) (JUL)	31-08-2017	1:30	AUD	-	0.006
Private Sector Credit (YoY) (JUL)	31-08-2017	1:30	AUD	-	0.054
RBA's Harris Panel Participation at Conference	31-08-2017	3:00	AUD	-	-
Gross Domestic Product (MoM) (JUN)	31-08-2017	12:30	CAD	-	0.006
Gross Domestic Product (YoY) (JUN)	31-08-2017	12:30	CAD	-	0.046
Quarterly Gross Domestic Product Annualized (2Q)	31-08-2017	12:30	CAD	-	0.037
Manufacturing PMI (AUG)	31-08-2017	1:00	CNY	-	51.4
Non-manufacturing PMI (AUG)	31-08-2017	1:00	CNY	-	54.5
Swift Global Payments CNY (JUL)	31-08-2017	1:00	CNY	-	0.0198
Euro-Zone Consumer Price Index - Core (YoY) (AUG A)	31-08-2017	9:00	EUR	-	0.012
Euro-Zone Consumer Price Index Estimate (YoY) (AUG)	31-08-2017	9:00	EUR	-	0.013
Euro-Zone Unemployment Rate (JUL)	31-08-2017	9:00	EUR	-	0.091
German Retail Sales (MoM) (JUL)	31-08-2017	6:00	EUR	-	0.011
German Retail Sales (YoY) (JUL)	31-08-2017	6:00	EUR	-	0.015
German Unemployment Change (AUG)	31-08-2017	7:55	EUR	-	-
German Unemployment Rate s.a. (AUG)	31-08-2017	7:55	EUR	-	0.057
BOE's Michael Saunders speaks in Cardiff, Wales	31-08-2017	7:25	GBP	-	-
Annualized Housing Starts (JUL)	31-08-2017	5:00	JPY	-	-
BOJ Masai speaks in Matsuyama	31-08-2017	1:30	JPY	-	-
Capital Spending (2Q)	31-08-2017	23:50	JPY	-	0.045
Capital Spending excl Software (2Q)	31-08-2017	23:50	JPY	-	0.052
Company Profits (2Q)	31-08-2017	23:50	JPY	-	0.266
Company Sales (2Q)	31-08-2017	23:50	JPY	-	0.056
Construction Orders (YoY) (JUL)	31-08-2017	5:00	JPY	-	0.023
Housing Starts (YoY) (JUL)	31-08-2017	5:00	JPY	-	0.017



Vehicle Production (YoY) (JUL)	31-08-2017	4:00	JPY	-	0.069
ANZ Activity Outlook (AUG)	31-08-2017	1:00	NZD	-	40.3
ANZ Business Confidence (AUG)	31-08-2017	1:00	NZD	-	19.4
QV House Prices (YoY) (AUG)	31-08-2017	17:00	NZD	-	0.064
Terms of Trade Index (QoQ) (2Q)	31-08-2017	22:45	NZD	-	0.051
Challenger Job Cuts (YoY) (AUG)	31-08-2017	11:30	USD	-	(0.376)
Chicago Purchasing Manager (AUG)	31-08-2017	13:45	USD	-	58.9
Continuing Claims (AUG 19)	31-08-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (AUG 25)	31-08-2017	14:30	USD	-	43
EIA Working Natural Gas Implied Flow (AUG 25)	31-08-2017	14:30	USD	-	43
Initial Jobless Claims (AUG 26)	31-08-2017	12:30	USD	-	-
PCE Deflator (MoM) (JUL)	31-08-2017	12:30	USD	-	0
Pending Home Sales (MoM) (JUL)	31-08-2017	14:00	USD	-	0.015
Pending Home Sales (YoY) (JUL)	31-08-2017	14:00	USD	-	0.007
Personal Consumption Expenditure Core (MoM) (JUL)	31-08-2017	12:30	USD	-	0.001
Personal Consumption Expenditure Core (YoY) (JUL)	31-08-2017	12:30	USD	-	0.015
Personal Consumption Expenditure Deflator (YoY) (JUL)	31-08-2017	12:30	USD	-	0.014
Personal Income (JUL)	31-08-2017	12:30	USD	-	0
Personal Spending (JUL)	31-08-2017	12:30	USD	-	0.001
Real Personal Spending (JUL)	31-08-2017	12:30	USD	-	0

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