



31 Oct.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,364	0.4 %	12.2 %
BSE SENSEX	33,266	0.3 %	11.2 %
CNX BANK	24,989	0.6 %	16.0 %
CNX MIDCAP	19,555	1.1 %	12.8 %
CNX SMALLCAP	8,508	1.6 %	20.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,349	(0.4) %	17.4 %
S&P 500	2,573	(0.3) %	14.0 %
FTSE 100	7,488	(0.2) %	4.3 %
HANG SENG	28,336	(0.4) %	27.9 %
NIKKEI	22,012	0.0 %	12.3 %
SHANGHAI COMPOSITE	3,390	(0.8) %	8.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.85	0.1 %	(3.8) %
EUR/USD	1.16	0.0 %	9.8 %
GBP/USD	1.32	0.5 %	7.3 %
USD/JPY	113.14	(0.9) %	(2.5) %
USD/AUD	1.30	(0.6) %	(4.9) %
USD/SGD	1.36	(0.5) %	(4.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	2.4 %	3.0 %
Gold(INR/10g)	29,269	0.0 %	5.2 %
Gold Comex(USD/oz)	1,275	0.5 %	10.2 %
SILVER(INR/1Kg)	38,727	0.1 %	(0.5) %
Aluminium(USD/MT)	2,119	(2.6) %	24.5 %
Copper(USD/MT)	6,832	(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: While the Commerce Department said personal income climbed by 0.4 percent in September after edging up by 0.2% in August. The Commerce Department also said personal spending surged up by 1% in September following a 0.1% gain in August. Eurozone economic confidence rose to the highest level since early 2001, survey results from the European Commission showed. The economic sentiment index improved more-than-expected to 114.0 in October from 113.1 in September. This was the highest since January 2001. Improved sentiment resulted from marked increases in confidence in the industry, retail trade and construction sectors and, to a lesser extent, from an increase in confidence in the services sector. German jobless rate held steady at adjusted 3.6% in September, data from Destatis showed Monday. On an unadjusted basis, the unemployment rate fell to 3.5% from 3.7% in August. Adjusted for seasonal and irregular effects, the number of unemployed decreased by around 18,000 to 1.54 million.

Global Equities: European markets edged up amid cautious mood as investors watched political developments in Spain and also eyed news about the next Federal Reserve Chair.

Indian Economy: The index of mineral production of mining and quarrying sector for the month of August (new Series 2011-12=100) 2017 at 92.7, was 9.4% higher as compared to the level in the month of August 2016. The cumulative growth for the period April- August 2017-18 over the corresponding period of previous year has been (+) 3.3%. The total estimated value of mineral production (excluding atomic & minor minerals) in the country during August 2017 was Rs. 18015 crore. The contribution of Coal was the highest at Rs. 6158 crore (34%). Next in the order of importance were: Petroleum (crude) Rs. 5489 crore, Natural gas (utilized) Rs. 2225 crore, Iron ore Rs. 1921 crore, Lignite Rs. 615 crore and Limestone Rs. 562 crore. These six minerals together contributed about 94% of the total value of mineral production in August 2017.

Equity Markets: Key indices settled with small gains as renewed buying was witnessed on the bourses as firmness in most global stocks perked up sentiment. The Sensex and the Nifty, both, hit record highs on intraday as well as on closing basis. The Sensex rose for the sixth straight day. State-run banks were in demand. Market edged higher in early trade tracking record close in US stocks.

Corporate News: India's largest mortgage lender Housing Development Finance Corporation (HDFC) on Monday reported 15% year-on-year (YoY) rise in net profit to Rs 2,101.12 crore for the quarter ended September 30, 2017 against Rs 1,826.50 crore in the corresponding quarter last year. Bharti Telecom will acquire 184,710,183 equity shares of Bharti Airtel from another promoter firm of the telecom major, Indian Continent Investment Limited (ICIL), at price of Rs 417.35 per share derived with weighted average market price of 60 days trading period. Net profit of Bharat Financial Inclusion declined 18.15% to Rs 119.40 crore in the quarter ended September 2017 as against Rs 145.88 crore during the previous quarter ended September 2016. Sales rose 13.72% to Rs 463.28 crore. Tata Steel reported a consolidated net profit of Rs 1018 crore in Q2 September 2017, compared with net loss of Rs 49 crore in Q2 September 2016. Revenue rose 20% to Rs 32464 crore in Q2 September 2017 over Q2 September 2016. The result was announced after market hours yesterday, 30 October 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	29.6	17.4	(8.4)
MF(INR cr)	307.6	478.9	602.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,269	33,974	31,123
F&O(INR cr)	312,063	670,327	601,311

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.8	10.1	11.0
NSE VIX	12.1	11.7	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,989	0.6 %	16.0 %	Energy	14,532	1.0 %	22.9 %
IT	10,854	(0.1) %	2.5 %	Pharma	9,755	1.1 %	(7.1) %
Metals	3,944	(0.0) %	27.0 %	Finance	10,222	0.4 %	15.8 %
Auto	11,427	1.0 %	15.2 %	PSU	3,867	1.2 %	9.7 %
FMCG	25,638	(0.7) %	8.5 %	Real Estate	296	2.0 %	35.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oil India	375	6.6 %	13.6 %	HCL Techno	836	(2.2) %	(3.5) %
Titan Comp	618	4.8 %	34.6 %	Hind. Unil	1,234	(2.1) %	34.1 %
Punjab Nat	204	3.7 %	36.0 %	Rural Elec	171	(1.6) %	(5.1) %
Britannia	4,746	3.2 %	39.9 %	ITC	265	(1.6) %	(5.8) %
MRF	66,779	3.1 %	9.5 %	Wipro	293	(1.2) %	15.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Manufacturing Index (OCT)	31-10-2017	22:30	AUD	-	54.2
CBA Australia PMI Mfg (OCT)	31-10-2017	22:00	AUD	-	53.8
CoreLogic House Px (MoM) (OCT)	31-10-2017	23:00	AUD	-	0.003
HIA New Home Sales (MoM) (SEP)	31-10-2017	0:00	AUD	-	0.091
Private Sector Credit (MoM) (SEP)	31-10-2017	0:30	AUD	-	0.005
Private Sector Credit (YoY) (SEP)	31-10-2017	0:30	AUD	-	0.055
Gross Domestic Product (MoM) (AUG)	31-10-2017	12:30	CAD	-	0
Gross Domestic Product (YoY) (AUG)	31-10-2017	12:30	CAD	-	0.038
Industrial Product Price (MoM) (SEP)	31-10-2017	12:30	CAD	-	0.003
Poloz and Wilkins testify at Finance Committee	31-10-2017	19:30	CAD	-	-
Raw Materials Price Index (MoM) (SEP)	31-10-2017	12:30	CAD	-	0.01
SNB 9M Earnings	31-10-2017	6:25	CHF	-	-
Swiss National Bank Releases 3Q 2017 Currency Allocation	31-10-2017	6:30	CHF	-	-
Manufacturing PMI (OCT)	31-10-2017	1:00	CNY	-	52.4
Non-manufacturing PMI (OCT)	31-10-2017	1:00	CNY	-	55.4
Euro-Zone Consumer Price Index Core (YoY) (OCT A)	31-10-2017	10:00	EUR	-	0.011
Euro-Zone Consumer Price Index Estimate (YoY) (OCT)	31-10-2017	10:00	EUR	-	0.015
Euro-Zone Gross Domestic Product s.a. (QoQ) (3Q A)	31-10-2017	10:00	EUR	-	0.006
Euro-Zone Gross Domestic Product s.a. (YoY) (3Q A)	31-10-2017	10:00	EUR	-	0.023
Euro-Zone Unemployment Rate (SEP)	31-10-2017	10:00	EUR	-	0.091
French Gross Domestic Product (QoQ) (3Q A)	31-10-2017	6:30	EUR	-	0.005
French Gross Domestic Product (YoY) (3Q A)	31-10-2017	6:30	EUR	-	0.018
GfK Consumer Confidence (OCT)	31-10-2017	0:01	GBP	-	(9)
Lloyds Business Barometer (OCT)	31-10-2017	0:01	GBP	-	23
Annualized Housing Starts (SEP)	31-10-2017	5:00	JPY	-	-
BOJ Kuroda speaks at press conference after MPM	31-10-2017	6:30	JPY	-	-
Construction Orders (YoY) (SEP)	31-10-2017	5:00	JPY	-	(0.106)
Housing Starts (YoY) (SEP)	31-10-2017	5:00	JPY	-	(0.02)
Vehicle Production (YoY) (SEP)	31-10-2017	4:00	JPY	-	0.056



ANZ Activity Outlook (OCT)	31-10-2017	0:00	NZD	-	29.6
ANZ Business Confidence (OCT)	31-10-2017	0:00	NZD	-	0
Average Hourly Earnings (QoQ) (3Q)	31-10-2017	21:45	NZD	-	0.008
Employment Change (QoQ) (3Q)	31-10-2017	21:45	NZD	-	(0.002)
Employment Change (YoY) (3Q)	31-10-2017	21:45	NZD	-	0.031
Labor Cost Private Sector (QoQ) (3Q)	31-10-2017	21:45	NZD	-	0.004
Participation Rate (3Q)	31-10-2017	21:45	NZD	-	0.7
Private Wages ex Overtime (QoQ) (3Q)	31-10-2017	21:45	NZD	-	0.004
Unemployment Rate (3Q)	31-10-2017	21:45	NZD	-	0.048
Chicago Purchasing Manager (OCT)	31-10-2017	13:45	USD	-	65.2
Conf. Board Expectations (OCT)	31-10-2017	14:00	USD	-	102.2
Conf. Board Present Situation (OCT)	31-10-2017	14:00	USD	-	146.1
Consumer Confidence Index (OCT)	31-10-2017	14:00	USD	-	119.8
Employment Cost Index (3Q)	31-10-2017	12:30	USD	-	0.005
S&P CoreLogic CS 20-City (MoM) SA (AUG)	31-10-2017	13:00	USD	-	0.0035
S&P/CaseShiller 20-City Index n.s.a. (AUG)	31-10-2017	13:00	USD	-	201.99
S&P/Case-Shiller US Home Price Index (AUG)	31-10-2017	13:00	USD	-	194.1
S&P/Case-Shiller US Home Price Index (YoY) (AUG)	31-10-2017	13:00	USD	-	0.0594
S&P/CS Composite-20 (YoY) (AUG)	31-10-2017	13:00	USD	-	0.0581
U.S. to Sell 4-Week Bills	31-10-2017	15:30	USD	-	-

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