

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	9873	(0.92)	NIFTY IT	10569.10	(0.59)
Sensex	31627	(0.93)	NIFTY BANK	24165.05	(0.84)
DowJones	22296	(0.24)	NIFTY 500	8638.30	(1.14)
Nasdaq	6371	(0.88)	NIFTY FMCG	24980.70	(0.95)
Hangseng	27510	0.03	NIFTY INFRA	3275.30	(1.11)
Shanghai	3341	(0.03)	NIFTY AUTO	10808.45	(1.09)
Nikkei	7224	(0.18)	NIFTY ENERGY	13035.00	(0.09)
Strait Times	3210	(0.18)	NIFTY PHARMA	9297.05	(1.78)
Kospi	2379	(0.04)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	10334	(0.01)	Advances	541	313
FTSE	7301	(0.13)	Declines	2020	1419
CAC	5267	(0.27)	Unchanged	172	51
DAX	12595	0.02	Total	2733	1783

Nifty Gainers		
Company	Price(Rs)	Chg(%)
TATAPOWER	82.00	1.99
COALINDIA	257.50	1.46
ZEEL	526.10	0.84
ICICIBANK	279.25	0.78
HINDUNILVR	1247.90	0.70

Nifty Losers		
Company	Price(Rs)	Chg(%)
ACC	1628.00	(3.57)
AUROPHARMA	699.50	(3.41)
ADANIPTS	387.85	(3.33)
AMBUJACEM	262.40	(2.78)
ULTRACEMCO	3899.00	(2.52)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
JKLAKSHMI	14.53	1.5	10
MARICO	27.44	3.1	9
SHREECEM	0.41	0.1	9
QUESS	0.94	0.1	9
GSKCONS	0.20	0.0	8

Indian Forex	Closing	Chg	% Chg
USD/INR	64.836	(0.124)	(0.19)
GBP/INR	87.937	(0.369)	(0.42)
EUR/INR	77.304	(0.453)	(0.58)
JPY/INR	57.750	(0.240)	(0.41)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29732	233
Silver (Rs/1kg)	39550	(50)

Commodities	Price	% Chg.
Crude (US\$/BBL)	52.2	3.28
Brent (US\$/BBL)	59.4	4.53
Gold (US/oz)	1313.4	1.36
Silver (US\$/oz)	17.2	1.47
Copper (US\$/MT)	6416.0	0.17
Alum (US\$/MT)	2128.0	(0.42)
Zinc(US\$/MT)	3168.0	1.75

ADR	Cl. Values	% Chg.
ICICI Bank	8.80	(1.00)
HDFC Bank	97.80	(0.60)
Infosys	14.60	(0.30)
Tata Steel Ltd	20.00	(4.00)
Dr. Deddy's Labs	37.70	(0.20)
Wipro	5.60	1.10
Tata Motors	31.80	(0.10)

## Market Sensor

US Market closed lower Monday as declines in technology stocks offset gains in energy stocks. Dow Jones Industrial Average was down 0.24% or 53.50 points at 22296.09. Nasdaq Composite was down 0.88% or 56.33 points at 6370.59. Standard & Poor's 500 was down 0.22% or 5.56 points at 2496.66.

Indian Equity market started the F&O expiry week on feeble note and lost nearly a percent. Geo-political tension and continued FII selling have negative sentiment in the market. Capital Goods, Auto, Pharma, Real Estate, FMCG stocks were major losers. Nifty ended the previous day with a decline of 0.92% or 91.80 points at 9872.60. On Monday's trading session, FIIs sold net Rs.1249.45 Cr in cash market and sold Rs.174.73 Cr in derivative segment. Whereas, DII bought net Rs.1009.98 Cr in cash segment.

## Global News

❖ A debate within the Federal Reserve over the outlook for U.S. inflation burst into public view just days after a rate-setting meeting in Washington, with one central banker saying inflation weakness is fading and another suggesting he's nervous it won't. (Reuters)

❖ U.S. companies' borrowing to spend on capital investment rose 1.3 percent in August from a year earlier, the Equipment Leasing and Finance Association (ELFA) said. (Reuters)

❖ Bank of Japan policymakers said they should stick with their current policy framework and had reason to be optimistic about consumer prices because measures of inflation expectations have stopped falling, minutes of the central bank's July 19-20 meeting showed on Tuesday. (Reuters)

❖ Chicago Federal Reserve Bank President Charles Evans, who votes on the Fed's monetary policy committee this year, told reporters after a speech on Monday that he is a little "nervous" the causes of low inflation might be structural rather than temporary. (Reuters)

❖ Japanese Prime Minister Shinzo Abe will order cabinet ministers on Monday to compile a stimulus package worth around 2 trillion yen (\$17.80 billion) to increase spending on child care and education, two government sources told Reuters. (Reuters)

## Economic News

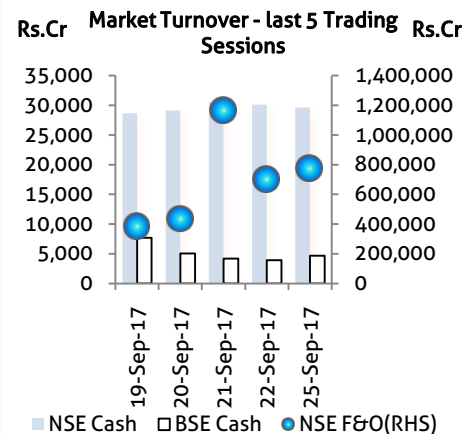
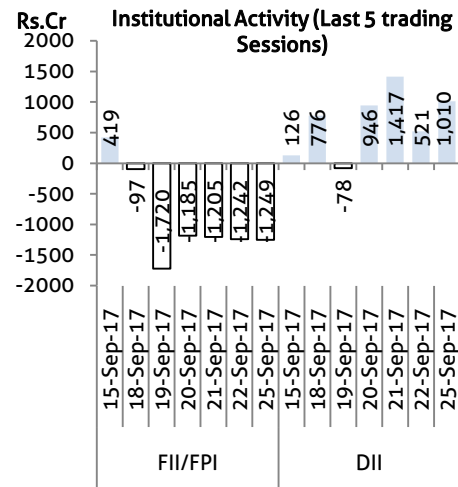
- ❖ Putting economic growth revival in the spotlight, Prime Minister Narendra Modi reconstituted the Economic Advisory Council under the chairmanship of NITI Aayog member Bibek Debroy.
- ❖ The Reserve Bank of India (RBI) barred banks from investing in category III alternative investment funds (AIFs), specified norms for their participation in commodity derivatives clearing, and tweaked rules on investing in financial services firms.
- ❖ Finance Minister Arun Jaitley on Friday said the government was in the process of addressing challenges posed by the economy which had seen "a little dip" in the last quarter.
- ❖ Power Minister R K Singh on Monday said India will achieve the target of power for all by December next year, while all villages will be electrified by the end of this year, much ahead of the schedule.
- ❖ Prime Minister Narendra Modi has set up an economic advisory council, the government said on Monday, as concerns grow about a slowdown in Asia's third-largest economy.
- ❖ Prime Minister Narendra Modi launched a Rs 16,320-crore scheme - Pradhan Mantri Sahaj Bijli Har Ghar Yojana 'Saubhagya' - to provide electricity connections to over 40 million families in rural and urban areas by December 2018.
- ❖ The country's foodgrain production from summer-sown crops in 2017-18 was likely to fall 2.8 per cent from a year ago to 134.67 million tonnes, mainly on account of lower rice output, the government said.
- ❖ Investment banking firm Jefferies on Monday said there is growth in digital payment mode by bank customers post-demonetisation whereas there has been a decline in usage of debit cards.
- ❖ The Reserve Bank of India (RBI) has been intervening to stem the rupee's appreciation, Chief Economic Adviser Arvind Subramanian said on Monday.
- ❖ India has seen strong FDI inflows under the NDA government even as domestic private investment continues to remain muted. This situation has baffled many. But unfazed by that, Prime Minister Narendra Modi has claimed credit for FDI surge, citing it as an endorsement of his government's overall economic policy.
- ❖ India has raised issues of market access and regulatory barriers with Indonesia that its companies in the pharma, dairy and bovine meat sectors face there.

## Domestic News

- ❖ Bhel has received shareholders' approval for the proposal to issue 1 new equity bonus share for every 2 existing shares and make a dividend payout of 79%.
- ❖ Watch out the entire power pack, Tata Power, Torrent Power, CG Power, Adani Power after the Prime Minister unveiled a Rs 16,320 crore 'Saubhagya' scheme to supply electricity to poor households.
- ❖ Suen Life Sciences has been granted a patent each by India and Japan for a drug used in the treatment of neuro-degenerative diseases.
- ❖ Novartis India's board approved share buyback worth up to Rs231 crore or up to 34,50,000 equity shares representing 12.26 per cent of equity capital of the company at a price of Rs670 per share.

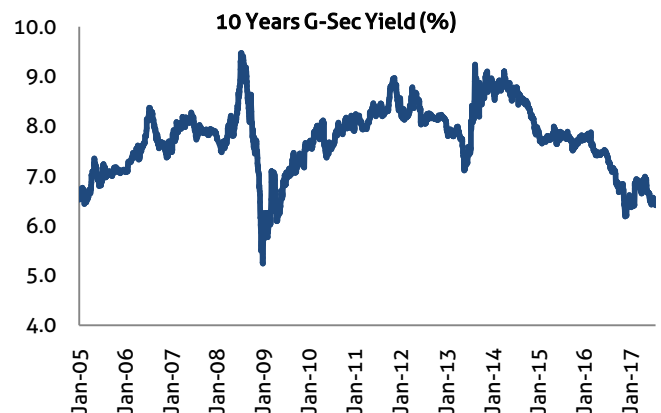
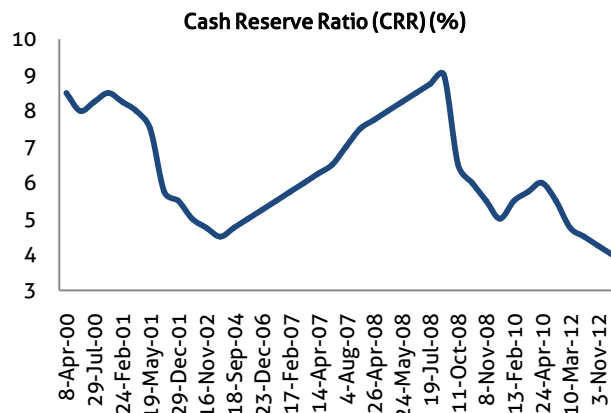
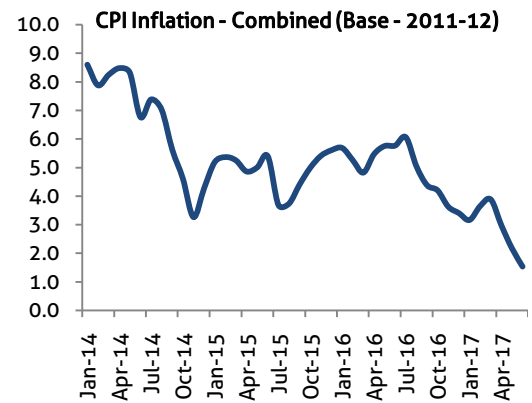
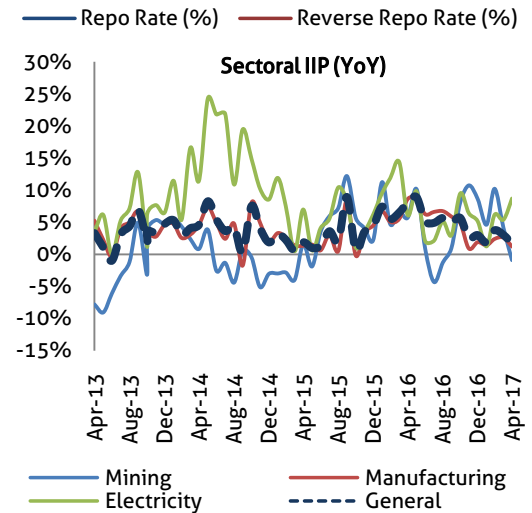
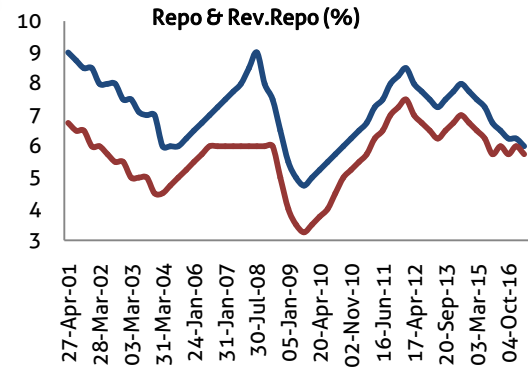
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1256	0.0002	0.02
GBP-USD	1.3481	0.0014	0.10
USD-JPY	111.65	(0.0700)	(0.06)

Bond Markets	Closing	Chg
10-yr bond	6.91	-14.90 bps
Interbank call	5.90	1.52 bps



## Domestic News (Cont...)

- ❖ IDBI Bank Ltd said it has sold 1% stake in Small Industries Development Bank of India (Sidbi) for an undisclosed amount in a bid to mobilise funds by exiting non-core business.
- ❖ Apollo Micro Systems Ltd has filed draft papers with the Sebi to raise about Rs156 crore through an initial share-sale offer.
- ❖ Thomas Cook is set to acquire Tata Capital's wholly-owned subsidiaries Tata Capital Forex and TC Travel and Services. The value of the proposed transaction was not disclosed.
- ❖ ONGC will acquire the government's 51.11 per cent stake in HPCL through a bulk or block deal sometime in November or December at the prevailing market price.
- ❖ Chennai Petroleum to set up new 9 mmtpa refinery at Nagapattinam at an estimated cost of Rs.27,460 crore.
- ❖ GAIL has approached the ministry of Environment, Forest and Climate Change for setting up a 1-million-tonne per annum capacity Greenfield Petrochemical Complex in East Godavari of Andhra Pradesh.
- ❖ Aditya Birla Capital has received in-principle approval from the Reserve Bank of India to set up an Asset Reconstruction Company.
- ❖ Lupin gets the U.S. FDA nod for Clobetasol propionate topical lotion.
- ❖ Gas production is expected to increase further by about 6-7 million metric standard cubic meter per day (mmscmd) by the end of current financial year, petroleum minister said.
- ❖ Maruti Suzuki has opened bookings for the new version of S-Cross, which it plans to launch later this week.
- ❖ Mahindra & Mahindra launched a variant of its compact SUV TUV300 priced at Rs 9.66 lakh (ex-showroom Mumbai).
- ❖ Jaguar Land Rover, the luxury unit of Tata Motors Ltd., is scouting for acquisitions of international automakers amid rising competition in the industry.
- ❖ Indiabulls Housing Finance has sought RBI approval to raise foreign loan of Rs 5,000 crore as part of its Rs 45,000 crore fund-raising programme for the full year.
- ❖ SBI lowered the minimum monthly average balance (MAB) requirement in a savings account to Rs 3,000, from Rs 5,000, and also revised downwards penalties for non-adherence.



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Sep-17	Indiabulls Real Estate Li	MARFATIA NISHIL SURENDRA	SELL	3441560	203.9
25-Sep-17	Capacite Infraproject Ltd	ALPHAGREP COMMODITIES PRIVATE LIMITED	SELL	1384640	358.3
25-Sep-17	Jaiprakash Associates Lim	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	SELL	23983917	17.4
25-Sep-17	Vadivarhe Spclty Chem Ltd	GARNET INTERNATIONAL LTD	SELL	171000	142.0
25-Sep-17	TV Today Network Limited	KOTAK MAHINDRA INTERNATIONAL LTD	BUY	425025	392.2

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Sep-17	JKLAKSHMI	GOLDMAN SACHS INDIA FUND LTD	S	1,364,736	387.5
25-Sep-17	CAPACITE	HARI KISHAN AGARWAL HUF	S	377,010	359.3
25-Sep-17	WHITEORG	MOHAN MECHEM PROJECTS PRIVATE LIMITED	B	102,500	96.9
25-Sep-17	AVL	NNM SECURITIES PVT LTD	B	80,000	48.6
25-Sep-17	FUNNY	NILESH RAMESHCHANDRA SHAH	S	246,651	12.6

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532782	SUTLEJTEX	26-Sep-17	Stock Split From Rs.10/- to Rs.1/-	27-Sep-17
504000	ELPROINTL	27-Sep-17	Stock Split From Rs.2/- to Rs.1/-	28-Sep-17
539227	LOYAL	27-Sep-17	Bonus issue 1:2	28-Sep-17
539207	MANPASAND	27-Sep-17	Bonus issue 1:1	28-Sep-17
533286	MOIL	27-Sep-17	Bonus issue 1:1	28-Sep-17
500049	BEL	28-Sep-17	Bonus issue 1:10	29-Sep-17
500493	BHARATFORG	28-Sep-17	Bonus issue 1:1	30-Sep-17
500103	BHEL	28-Sep-17	Bonus issue 1:2	30-Sep-17
532268	KALECONSUL	28-Sep-17	Final Dividend - Rs. - 40.0000	-
538712	SEOFIDD	28-Sep-17	Dividend On Mutual Fund	29-Sep-17
538710	SEOFIDR	28-Sep-17	Dividend On Mutual Fund	29-Sep-17
532928	TRIL	28-Sep-17	Stock Split From Rs.10/- to Rs.1/-	30-Sep-17
514358	EVERLON	29-Sep-17	Consolidation of Shares	03-Oct-17
536709	INDRENEW	29-Sep-17	Consolidation of Shares	03-Oct-17
524820	PANAMAPET	03-Oct-17	Bonus issue 1:2	04-Oct-17
533373	IPRU1099	05-Oct-17	Temporary Suspension	06-Oct-17
533375	IPRU1100P	05-Oct-17	Temporary Suspension	06-Oct-17
533369	IPRU1306	05-Oct-17	Temporary Suspension	06-Oct-17
533371	IPRU1307P	05-Oct-17	Temporary Suspension	06-Oct-17
533376	IPRU1692	05-Oct-17	Temporary Suspension	06-Oct-17
533372	IPRU1693	05-Oct-17	Temporary Suspension	06-Oct-17
535675	IPRU8065	05-Oct-17	Temporary Suspension	06-Oct-17

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
25-Sep-17	JPY	Manufacturing PMI (Sep)			52.2
26-Sep-17	USD	S&P/CS HPI Composite - 20 n.s.a. (MoM) (Jul)		0.80%	0.70%
26-Sep-17	USD	CB Consumer Confidence (Sep)		120.6	122.9
26-Sep-17	USD	New Home Sales (MoM) (Aug)		0.70%	-9.40%
27-Sep-17	GBP	Current Account (Q2)		-15.8B	-16.9B
27-Sep-17	GBP	GDP (YoY) (Q2)		1.70%	1.70%
27-Sep-17	USD	MBA 30-Year Mortgage Rate			4.04%
27-Sep-17	USD	Durable Goods Orders (MoM) (Aug)		1.50%	-6.80%
27-Sep-17	USD	Pending Home Sales (MoM) (Aug)		0.20%	-0.80%
28-Sep-17	EUR	Business and Consumer Survey (Sep)		111.8	111.9
28-Sep-17	EUR	Business Climate (Sep)		1.1	1.1
28-Sep-17	EUR	Consumer Confidence (Sep)		-1.2	-1.5
28-Sep-17	EUR	Industrial Sentiment (Sep)		5	5.1
28-Sep-17	USD	Core PCE Prices (Q2)			0.90%
28-Sep-17	USD	GDP (QoQ) (Q2)		3.00%	3.00%
28-Sep-17	USD	Real Consumer Spending (Q2)			3.30%
29-Sep-17	GBP	GfK Consumer Confidence (Sep)		-12	-10
29-Sep-17	JPY	Household Spending (YoY) (Aug)		1.00%	-0.20%
29-Sep-17	JPY	Jobs/applications ratio (Aug)		1.53	1.52
29-Sep-17	JPY	National Core CPI (YoY) (Aug)		0.70%	0.50%
29-Sep-17	JPY	Tokyo Core CPI (YoY) (Sep)		0.50%	0.40%
29-Sep-17	JPY	Unemployment Rate (Aug)		2.80%	2.80%
29-Sep-17	JPY	Industrial Production (MoM) (Aug)		1.90%	-0.80%
29-Sep-17	GBP	BoE Consumer Credit (Aug)		1.400B	1.179B
29-Sep-17	GBP	Mortgage Approvals (Aug)		67.00K	68.69K
29-Sep-17	EUR	CPI (YoY) (Sep)		1.50%	1.30%
29-Sep-17	USD	Core PCE Price Index (MoM) (Aug)		0.20%	0.10%
29-Sep-17	USD	Personal Income (MoM) (Aug)		0.20%	0.40%
29-Sep-17	USD	Personal Spending (MoM) (Aug)		0.10%	0.30%
29-Sep-17	USD	Chicago PMI (Sep)		58.2	58.9
29-Sep-17	USD	Michigan Consumer Sentiment (Sep)		96	95.3

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
29-Sep-17	INR	Infrastructure Output (YoY) (Aug)			2.40%

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