

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	9796	(1.18)	NIFTY IT	10505.95	(0.81)
Sensex	31388	(1.14)	NIFTY BANK	24128.95	(1.02)
DowJones	21865	0.26	NIFTY 500	8571.80	(1.13)
Nasdaq	6302	0.30	NIFTY FMCG	25529.50	(0.90)
Hangseng	27946	0.65	NIFTY INFRA	3288.35	(1.37)
Shanghai	3365	(0.02)	NIFTY AUTO	10503.50	(0.84)
Nikkei	7259	0.55	NIFTY ENERGY	12749.05	(1.65)
Strait Times	3259	0.30	NIFTY PHARMA	8865.05	(1.23)
Kospi	2366	0.07	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	10540	0.41	Advances	789	480
FTSE	7337	(0.87)	Declines	1784	1211
CAC	5032	(0.94)	Unchanged	127	59
DAX	11946	(1.46)	Total	2700	1750

Nifty Gainers		
Company	Price(Rs)	Chg(%)
TECHM	433.00	1.23
M&M	1375.00	0.14
ZEEL	518.50	0.12
WIPRO	290.85	0.05
0	0.00	0.00

Nifty Losers		
Company	Price(Rs)	Chg(%)
BANKBARODA	139.95	(2.98)
NTPC	168.25	(2.91)
HINDALCO	227.35	(2.65)
TATAPOWER	77.00	(2.35)
SUNPHARMA	481.90	(2.29)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
RBLBANK	208.05	24.5	8
MAHSEAMLES	2.19	0.3	8
SFL	0.89	0.1	8
GABRIEL	12.27	1.7	7
LALPATHLAB	14.99	2.3	7

Indian Forex	Closing	Chg	% Chg
USD/INR	64.017	0.147	0.23
GBP/INR	82.883	0.523	0.63
EUR/INR	76.751	0.534	0.70
JPY/INR	58.810	0.280	0.48

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29780	456
Silver (Rs/1kg)	40000	898

Commodities	Price	% Chg.
Crude (US\$/BBL)	46.3	(1.07)
Brent (US\$/BBL)	51.9	(0.35)
Gold (US/oz)	1317.5	(0.40)
Silver (US\$/oz)	17.5	(0.28)
Copper (US\$/MT)	6797.0	1.24
Alum (US\$/MT)	2092.0	(0.21)
Zinc(US\$/MT)	3107.5	(0.32)

ADR	Cl. Values	% Chg.
ICICI Bank	9.40	(0.60)
HDFC Bank	95.90	0.00
Infosys	15.20	1.10
Tata Steel Ltd	19.10	0.60
Dr. Deddy's Labs	31.70	0.20
Wipro	6.00	(0.30)
Tata Motors	30.00	(0.60)

## Market Sensor

US Market regained their footing to close higher on Tuesday as investors shook off the tension between the U.S. and North Korea. Dow Jones Industrial Average was up 0.26% or 56.97 points at 21865.37 Nasdaq Composite was up 0.30% or 18.87 points at 6301.89 Standard & Poor's 500 was up 0.08% or 2.06 points at 2446.30

Indian Equity market s fell sharply and lost over a percent, mainly pressurised by weak global cues. The Korean peninsula was on the boil after North Korea fired the ballistic missile that flew over Japan before plunging into the Pacific Ocean. Nifty ended the previous day with a decline of 1.18% or 116.75 points at 9796.05. On Tuesday's trading session, FII's sold net Rs.1459.64 Cr in cash market and sold Rs.918.72 Cr in derivative segment. Whereas, DII bought net Rs.1391.33 Cr in cash segment.

## Global News

- ❖ China's central bank raised its official yuan midpoint CNY=PEOC on Wednesday to 6.6102 per dollar, the strongest level since Aug. 17, 2016, reflecting broad weakness in the U.S. currency in global markets and gains in the spot yuan rate from a day earlier. (Reuters)
- ❖ Japan's retail sales growth slowed in July as shoppers spent less on clothes and cars, but economists remain optimistic that consumer spending will soon gather pace due to a tight labour market. (Reuters)
- ❖ British shoppers could face higher prices and less choice unless Britain and the European Union can agree how to handle thorny issues like haulage and food safety after Brexit, an industry body said on Wednesday. (Reuters)
- ❖ Harvey, which is on track to be one of the costliest U.S. storms, would reduce U.S. economic growth by a small 0.1 percentage point in the third quarter, Citi economists said on Tuesday. (Reuters)
- ❖ The leaders of Germany and France said on Tuesday they are ready to press ahead with deeper European integration, promising a tighter euro zone at the core of the European Union shaken by Britain's vote to leave. (Reuters)

## Economic News

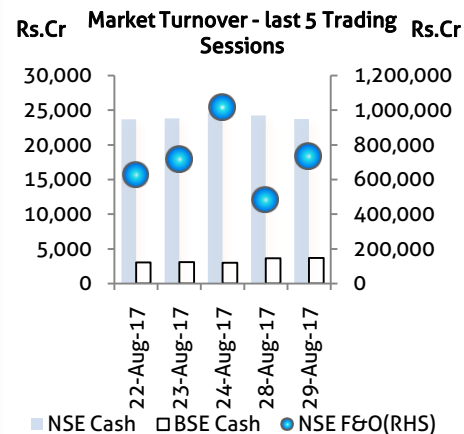
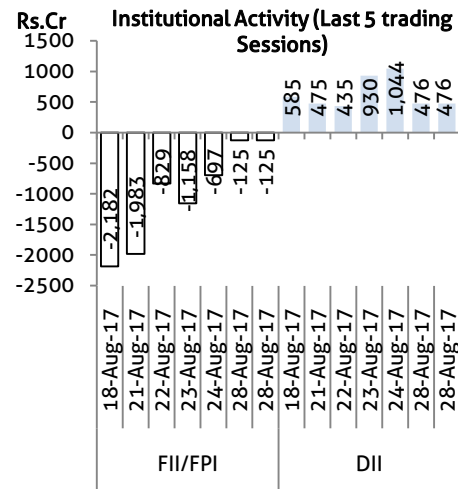
- ❖ The energy sector is staring at the prospect of low capacity utilisation in power generation as plant load factor is estimated to stay soft at around 62 per cent until 2018-19, says an ASSOCHAM-Crisil joint study.
- ❖ The jute industry is projected to lose Rs 200 crore annually in the wake of new pricing recommendations made by the Tariff Commission in its latest report.
- ❖ Introduction of the GST has hurt revenue growth and led to a major contraction in profit margins for India Inc, which was just coming out of the demonetisation reverses, a report said on Tuesday.
- ❖ Taking stock of the goods and services tax (GST) in the first month of its rollout, Union Finance Minister Arun Jaitley on Tuesday said the net GST collections for the month of July stood at Rs 92, 283 crore.
- ❖ The government has set a window of two years to start the auction of mining leases due to expire in March 2020, a top official said.
- ❖ India-focused offshore equity funds and exchange traded funds (ETFs) have witnessed net investment of over \$5.3 billion in the first seven months of this year, according to a Morningstar report.
- ❖ Lockheed Martin is closing in on an international deal for F-16 fighter planes, and has offered to eventually build all the jets at a proposed plant in India if it wins a bigger order to supply the Indian Air Force, a top executive said.
- ❖ Exporters need "help and hand holding" as they face global headwinds and the government is looking at all options to support them, particularly small and medium players, Commerce Minister Nirmala Sitharaman said on Tuesday.
- ❖ The union ministry of chemicals and fertilisers has sought goods and service tax (GST) on the purchase of goods and concession on electricity duty on power generation from the Odisha government to improve the internal rate of return of the 1.27 million tonne capacity Talcher Fertiliser plant.
- ❖ The final report on employment data by the task force headed by Niti Aayog Vice Chairman Arvind Panagariya is likely to be submitted before he leaves the government think tank on August 31, a senior official said.

## Domestic News

- ❖ NR Narayana Murthy lauded what he termed as "corrective actions" being taken by the newly appointed non-executive chairman of Infosys Nandan Nilekani, but the founder of Infosys told investors on a conference call on Tuesday evening that the "rejuvenation of the board was still a work-in-progress".
- ❖ Lux Industries has roped in Bollywood actor Amitabh Bachchan as brand ambassador for LUX Venus and LUX Cott'swool. The endorsement fee for the actor is said to be in the range of Rs 6-10 crore, according to industry estimates.
- ❖ An offer for sale of shares of NTPC was subscribed 1.4 times by non-retail investors on the first day. The government is selling a 5 per cent stake, or 41.22 crore shares, at a floor price of Rs 168 each. The government expects to garner Rs 7,000 crore from the two day sale, with an option to retain a similar portion in case of over-subscription.
- ❖ Cadila Healthcare has received establishment inspection report from the US health regulator for its manufacturing facility at the pharma SEZ in Ahmedabad.

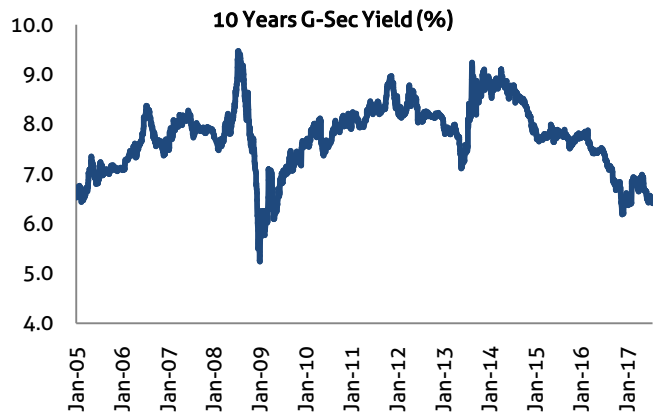
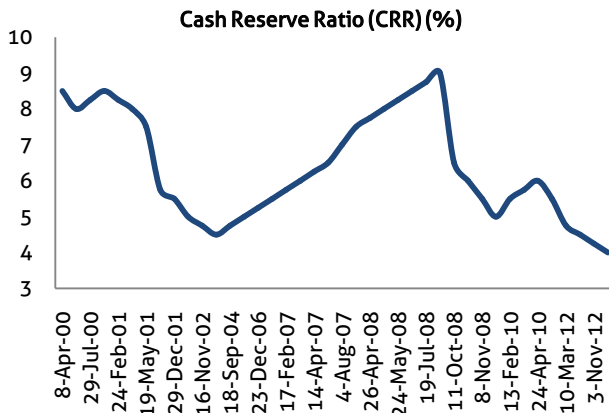
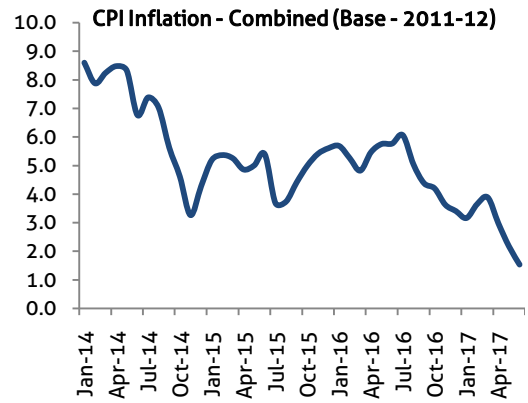
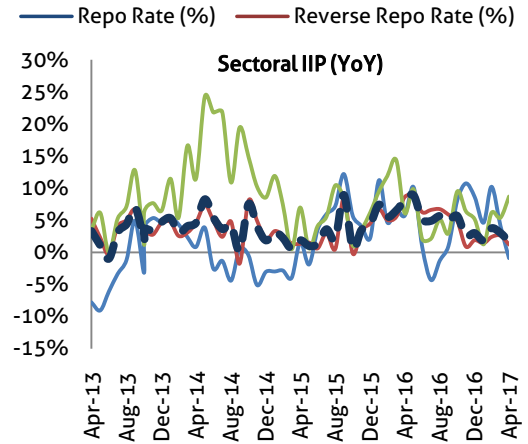
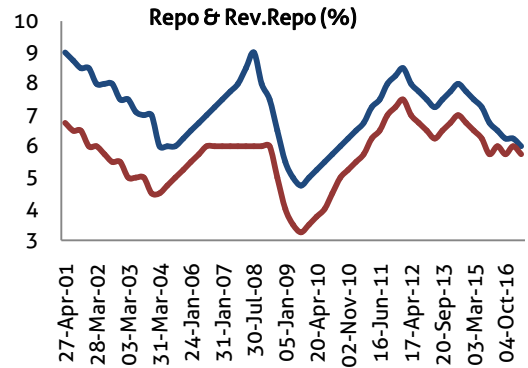
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1256	0.0002	0.02
GBP-USD	1.2923	0.0002	0.02
USD-JPY	109.78	0.0800	0.07

Bond Markets	Closing	Chg
10-yr bond	6.79	-1.60 bps
Interbank call	5.85	-0.27 bps



## Domestic News (Cont...)

- ❖ Aurobindo Pharma Gets US FDA Nod For Cholesterol Drug, Ezetimibe Tablet.
- ❖ The government has imposed stock limits on sugar mills, a move aimed at keeping prices stable during the festive season when consumption increases.
- ❖ Minda Industries to acquire 60 percent stake in MI Torica India for Rs 8.80 crore.
- ❖ Tata Power Renewable Energy Ltd. (TPREL) increased its generation capacity by 337 per cent to 1440 MUs in FY17.
- ❖ RBI has sent commercial banks a second list of at least 26 defaulters with which it wants creditors to start the process of debt resolution before 13 December failing could initiating bankruptcy proceedings.
- ❖ Aurobindo Pharma Ltd is in talks to buy the Russia business of Mumbai-based Shreya Life Sciences Pvt. Ltd in a deal potentially valued between \$80 million and \$100 million.
- ❖ HCL Infosystems said its board has approved a plan to raise up to Rs500 crore from its existing shareholders.
- ❖ To meet the rising demand for petrochemicals, especially plastics and polymers, Indian Oil will invest Rs 32,000 crore to ramp up its output by fiscal 2021.
- ❖ TVS Logistics Services, part of \$7-billion worth TVS Group, has set the target of \$1-billion revenue in the next three years. This comes on the backdrop of opportunities opened up after the implementation of goods and services tax (GST).
- ❖ Citing high workload, the US Food and Drug Administration (USFDA) has increased fee for processing Abbreviated New Drug Application (ANDA) by over \$1 lakh to \$1.71 lakh for the financial year (FY)2018.
- ❖ MRF Tyres plans to increase its revenue to around Rs 20,000-22,000 crore by 2020-21. To back this target, the company plans to invest around Rs 800-1,000 crore every year on products and brown field expansion. And, it also expects Rs 4,000 crore facility in Gujarat to go live by 2020.
- ❖ Ujjivan Small Finance Bank, subsidiary of Ujjivan Financial Services, granted "scheduled bank" status.
- ❖ Vijaya Bank has managed to raise Rs. 700 crore by selling shares to institutional investors in QIP which closed on Tuesday .



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Aug-17	Sarla Performance Fibers	SATIDHAM INDUSTRIES PVT. LTD	BUY	6000000	48.1
29-Aug-17	Bombay Dyeing & Mfg Co.	JAYNEEL SECURITIES PRIVATE LIMITED	SELL	1051068	92.4
29-Aug-17	Lexus Granito (India) Ltd	PATEL KAMLESH BHAGUBHAI	BUY	204000	83.2
29-Aug-17	Onward Technologies Ltd	ARCADIA SHARE & STOCK BROKERS PRIVATE LIMITED	SELL	82774	125.6
29-Aug-17	Momai Apparels Ltd.	SUNGLOW CAPITAL SERVICES LTD.	SELL	80000	125.4

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Aug-17	RBLBANK	NORGES BANK ON ACCOUNT OF THE GOVERNMENT PENSION FUND GLOBAL	B	3,834,009	515.0
29-Aug-17	LALPATHLAB	WAGNER LIMITED	S	750,000	780.0
29-Aug-17	SRGHFL	VINOD KUMAR JAIN	B	120,000	207.1
29-Aug-17	BNRUDY	CHETANYA DIYA HUF	S	205,759	58.7
29-Aug-17	VJTFEDU	VINAY DHARAMCHAND JAIN	S	190,000	60.0

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
524226	GAEL	30-Aug-17	Final Dividend - Rs. - 0.8000	-
500380	JKLAKSHMI	30-Aug-17	Dividend - Rs. - 0.7500	-
532732	KKCL	30-Aug-17	Final Dividend - Rs. - 1.5000	-
538624	KTKFMP163D	30-Aug-17	Redemption of Mutual Fund	31-Aug-17
538623	KTKFMP163G	30-Aug-17	Redemption of Mutual Fund	31-Aug-17
538625	KTKFMP163GD	30-Aug-17	Redemption of Mutual Fund	31-Aug-17
539275	MSL	30-Aug-17	Bonus issue 1:1	31-Aug-17
506734	MYSORPETRO	30-Aug-17	Dividend - Rs. - 1.0000	-
512626	ORBTEXP	30-Aug-17	Final Dividend - Rs. - 0.6000	-
523642	PIIND	30-Aug-17	Final Dividend - Rs. - 2.5000	-
516016	SHREYANIND	30-Aug-17	Dividend - Rs. - 1.5000	-
516108	STHINPA-B	30-Aug-17	Dividend - Rs. - 1.5000	-
522108	YUKEN	30-Aug-17	Dividend - Rs. - 1.0000	-
522273	AHMDSTE	31-Aug-17	Dividend - Rs. - 0.5000	01-Sep-17
539523	ALKEM	31-Aug-17	Final Dividend - Rs. - 9.0000	01-Sep-17
518091	APCL	31-Aug-17	Final Dividend - Rs. - 1.0000	-
511605	ARIHCAPM	31-Aug-17	Dividend - Rs. - 0.7500	-
536147	BSLAPXDG	31-Aug-17	Temporary Suspension	01-Sep-17
536148	BSLAPXDND	31-Aug-17	Temporary Suspension	01-Sep-17
536149	BSLAPXDQD	31-Aug-17	Temporary Suspension	01-Sep-17
536150	BSLAPXRG	31-Aug-17	Temporary Suspension	01-Sep-17
536151	BSLAPXRND	31-Aug-17	Temporary Suspension	01-Sep-17

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
14-Aug-17	JPY	GDP (YoY) (Q2)		2.50%	1.00%
14-Aug-17	CNY	Industrial Production (YoY) (Jul)		7.20%	7.60%
14-Aug-17	CNY	Retail Sales (YoY) (Jul)		10.80%	11.00%
14-Aug-17	EUR	Industrial Production (YoY) (Jun)		2.90%	4.00%
15-Aug-17	JPY	Industrial Production (MoM) (Jun)			1.60%
15-Aug-17	GBP	CPI (YoY) (Jul)		2.70%	2.60%
15-Aug-17	GBP	House Price Index (YoY)			4.70%
15-Aug-17	GBP	PPI Input (YoY) (Jul)		6.90%	9.90%
15-Aug-17	GBP	PPI Output (YoY) (Jul)		3.10%	3.30%
15-Aug-17	GBP	RPI (YoY) (Jul)		3.40%	3.50%
15-Aug-17	USD	Core Retail Sales (MoM) (Jul)		0.40%	-0.20%
15-Aug-17	USD	Export Price Index (MoM) (Jul)		0.10%	-0.20%
15-Aug-17	USD	Import Price Index (MoM) (Jul)		0.10%	-0.20%
15-Aug-17	USD	NY Empire State Manufacturing Index (Aug)		10	9.8
15-Aug-17	USD	Retail Control (MoM) (Jul)		0.40%	-0.10%
15-Aug-17	USD	Retail Sales (MoM) (Jul)		0.40%	-0.20%
15-Aug-17	USD	Business Inventories (MoM) (Jun)		0.40%	0.30%
16-Aug-17	USD	TIC Net Long-Term Transactions (Jun)			91.9B
16-Aug-17	GBP	Unemployment Rate (Jun)		4.50%	4.50%
16-Aug-17	EUR	GDP (YoY) (Q2)		2.10%	2.10%
16-Aug-17	USD	MBA 30-Year Mortgage Rate			4.14%
16-Aug-17	USD	Building Permits (Jul)		1.246M	1.275M
16-Aug-17	USD	Housing Starts (Jul)		1.222M	1.215M
17-Aug-17	JPY	Trade Balance (Jul)		392B	440B
17-Aug-17	GBP	Retail Sales (YoY) (Jul)		1.40%	2.90%
17-Aug-17	EUR	CPI (YoY) (Jul)		1.30%	1.30%
17-Aug-17	EUR	Trade Balance (Jun)			21.4B
17-Aug-17	USD	Philadelphia Fed Manufacturing Index (Aug)		18	19.5
17-Aug-17	USD	Industrial Production (MoM) (Jul)		0.30%	0.40%
18-Aug-17	EUR	Current Account n.s.a. (Jun)			18.3B
18-Aug-17	USD	Michigan Consumer Sentiment (Aug)		93.9	93.4

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
14-Aug-17	INR	WPI Inflation (YoY) (Jul)		1.30%	0.90%
14-Aug-17	INR	CPI (YoY) (Jul)		1.87%	1.54%
14-Aug-17	INR	Trade Balance			-12.96B
18-Aug-17	INR	Bank Loan Growth			6.20%
18-Aug-17	INR	Deposit Growth			10.40%

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