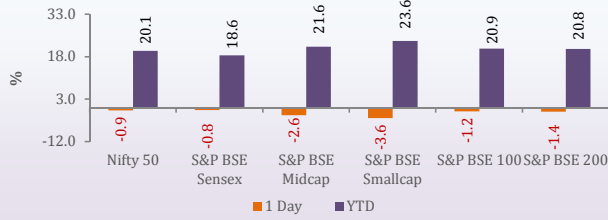
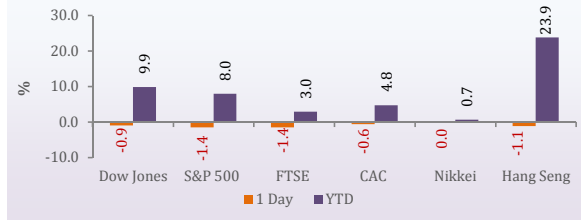


Equity Market Update

Indian Indices



Global Indices



Institutional Flows - Equity

(₹ Cr.)	Purchase	Sales	Net
FII Flows	3,644	4,073	-429
MF Flows**	2,083	1,435	648
DII Flows	2,886	2,333	553

Institutional Flows - Debt

(₹ Cr.)	Purchase	Sales	Net
FII Flows	1,608	274	1,334
MF Flows**	6,101	5,786	315

** Data as on Aug 08, 2017

- Indian equity markets remained weak amid selling pressure in realty and healthcare sectors. Lower than expected corporate earning numbers for Jun quarter weighed on market sentiment. Ongoing geopolitical tensions between the U.S. and North Korea added to the losses.
- Key benchmark indices S&P BSE Sensex and Nifty 50 slipped 0.84% and 0.89% to close at 31,531.33 and 9,820.25, respectively. S&P BSE Mid-Cap and S&P BSE Small-Cap slipped 2.64% and 3.60%, respectively.

Debt Market Update

Daily Rates (%)

Key Indicators	10-Aug-17	09-Aug-17	Change (in bps)
Call	5.86	5.91	-5
CBLO	5.94	6.02	-8
10 Yr GOI Bond	6.50	6.47	3
3 M CD	6.19	6.19	0
3 M CP	6.56	6.58	-2

Liquidity Indicators (₹ Cr.)

Description	10-Aug-17	09-Aug-17	Year Ago
G-Sec	45,135	26,849	126,512
LAF	2,355	-834	10,404
T-Bill	4,692	10,500	7,414
Call	12,885	14,366	15,922
CBLO	110,203	114,346	86,333

- Bond yields rose as supply dynamics came into play after the Reserve Bank of India (RBI) conducted open market sales of debt securities to absorb excess liquidity from the system. Market participants also preferred to remain on the sidelines ahead of the weekly debt auction due Aug 11.
- Yield on the 10-year benchmark paper (6.79% GS 2027) rose 2 bps to 6.49% from 6.47% in the previous trading session. During the session, bond yields traded in the range of 6.46% and 6.50%.

Update on Other Asset Classes

Daily Commodity Market Rates

(in \$)	10-Aug-17	09-Aug-17	% Change
Gold (oz)	1,286.00	1,277.15	0.69
Crude (bbl)	48.49	49.54	-2.12
Silver (oz)	17.08	16.91	1.02
(in ₹)	10-Aug-17	09-Aug-17	% Change
Gold (10 gm)	28,901	28,560	1.19
Crude (1 bbl)	3,159	3,134	0.80
Silver (1 Kg)	38,886	37,797	2.88

Daily Currency Market Rates

Commodity	10-Aug-17	09-Aug-17	% Change
USD/INR	63.94	63.75	0.31
EURO/INR	75.06	74.86	0.27
GBP/INR	83.01	82.92	0.10
JPY/INR	0.58	0.58	0.36
USD/EURO	0.85	0.85	-0.11
USD/JPY	109.20	110.06	-0.78
USD/GBP	0.77	0.77	0.23

- As per media reports, mutual fund ownership of BSE 500 companies has climbed to 6% as of Jun 2017, from 3% in Mar 2014, marking a new high. The growth was triggered by record inflows through systematic investment plans into equity schemes, which in turn led to consistent net buying from asset management companies in Indian stocks.



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