



01 Feb.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| CNX NIFTY | 11,028 | (0.2) % | 19.4 % |
| BSE SENSEX | 35,965 | (0.2) % | 20.2 % |
| CNX BANK | 27,379 | 0.4 % | 27.1 % |
| CNX MIDCAP | 20,785 | (1.5) % | 19.9 % |
| CNX SMALLCAP | 8,817 | (1.2) % | 24.7 % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 26,149 | 0.3 % | 5.3 % |
| S&P 500 | 2,824 | 0.1 % | 4.7 % |
| FTSE 100 | 7,534 | (0.7) % | (1.5) % |
| HANG SENG | 32,887 | 0.9 % | 7.8 % |
| NIKKEI | 23,098 | (0.8) % | (1.7) % |
| SHANGHAI COMPOSITE | 3,481 | (0.2) % | 4.0 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|-------|---------|
| USD/INR | 63.59 | 0.0 % | (0.1) % |
| EUR/USD | 1.24 | 0.4 % | 3.4 % |
| GBP/USD | 1.42 | 1.1 % | 5.1 % |
| USD/JPY | 109.39 | 0.3 % | (3.0) % |
| USD/AUD | 1.24 | 0.4 % | (2.8) % |
| USD/SGD | 1.31 | 0.0 % | (1.7) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 65 | (1.6) % | 6.8 % |
| Gold(INR/10g) | 30,207 | (0.3) % | 2.9 % |
| Gold Comex(USD/oz) | 1,344 | 0.4 % | 2.7 % |
| SILVER(INR/1Kg) | 39,065 | 0.1 % | 1.2 % |
| Aluminium(USD/MT) | 2,229 | (1.0) % | (1.2) % |
| Copper(USD/MT) | 7,049 | (0.2) % | (1.8) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 2.7 | 0.0 % | 0.3 % |

Global Economy: The US Federal Reserve voted to leave its benchmark interest rate unchanged, in a range between 1.25% and 1.5%. However, the monetary policy statement hinted that the Fed will increase the benchmark rate at its next meeting, in late March. Information received since the Federal Open Market Committee met in December indicates that the labor market has continued to strengthen and that economic activity has been rising at a solid rate, the statement read. Gains in employment, household spending, and business fixed investment have been solid, and the unemployment rate has stayed low. The Fed said it expects inflation to "move up" in 2018, setting the table for one of three rate hikes projected by year's end. Eurozone inflation slowed as expected on lower energy prices at the start of the year, giving more time for the central bank to start tightening. Headline inflation came in at 1.3% in January, in line with expectations, but weaker than December's 1.4%, flash data from Eurostat revealed Wednesday. The inflation figure continues to stay below the European Central Bank's target of 'below, but close to 2%. Excluding energy, food, alcohol and tobacco, core inflation rose marginally to 1% from 0.9% in December.

Global Equities: US markets recovered after the Fed statement and ended modestly higher. European shares were marginally higher on Wednesday as investors digested mixed earnings and economic releases.

Indian Economy: Nominal GDP or GDP at current prices for the year 2016-17 is estimated as Rs. 152.54 lakh crore while that for the year 2015-16 is estimated as Rs. 137.64 lakh crore, exhibiting a growth of 10.8% during 2016-17 as against 10.4% during 2015-16. Real GDP or GDP at constant (2011-12) prices for the years 2016-17 and 2015-16 stands at Rs. 121.96 lakh crore and Rs. 113.86 lakh crore, respectively, showing growth of 7.1% during 2016-17 and 8.2% during 2015-16. Per Capita Income, i.e., Per Capita Net National Income at current prices, is estimated as Rs. 94,731 and Rs. 1,03,870 respectively for the years 2015-16 and 2016-17. Correspondingly, Per Capita PFCE at current prices, for the years 2015-16 and 2016-17 is estimated at Rs. 63,065 and Rs. 69,322 respectively.

Equity Markets: Local stocks drifted lower to hit over one-week closing lows as investors remained cautious ahead of the Union Budget 2018-19. The Sensex settled below the psychological 36,000 mark. But, the Nifty managed to hold the psychological 11,000 level after falling below that level in intraday trade. Private sector bank stocks saw mixed trend. PSU bank stocks declined. Auto stocks saw mixed trend. Pharmaceutical shares declined.

Corporate News: Growth of the eight core sectors slowed to a five-month low of 4% in December 2017 due to negative performance of segments like coal and crude oil, official data showed today. The output growth recorded in December is the lowest since July 2017, when these core sectors had witnessed 2.9% expansion. These eight industries -- coal, crude oil, natural gas, refinery products, fertilisers, steel, cement and electricity -- had witnessed a growth of 5.6% in December 2016. The output of coal and crude oil sectors contracted 0.1% and 2.1% respectively, according to the latest data. Country's largest lender State Bank of India today said it has received board approval to divest 4.40 per cent stake in Clearing Corporation of India. JSW Steel saw its profit more than double to a record during the third quarter, helped by buoyant steel prices and rising volumes. Net income jumped to Rs1,750 crore (\$274 million) in the three months to 31 December, from Rs730 crore a year earlier,



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|---------|-------|-------|
| FII(USD mm) | 5.1 | 99.1 | 15.4 |
| MF(INR cr) | 1,050.9 | 350.1 | 553.9 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 43,662 | 41,118 | 33,139 |
| F&O(INR cr) | 473,999 | 727,717 | 632,218 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 14.8 | 10.9 | 10.9 |
| NSE VIX | 15.9 | 14.7 | 12.5 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|---------|--------|-------------|--------|---------|----------|
| Banks | 27,379 | 0.4 % | 27.1 % | Energy | 14,454 | 0.6 % | 22.3 % |
| IT | 12,986 | (0.9) % | 22.6 % | Pharma | 9,385 | (1.9) % | (10.7) % |
| Metals | 4,066 | (1.2) % | 30.9 % | Finance | 11,262 | 0.5 % | 27.6 % |
| Auto | 11,612 | (0.1) % | 17.0 % | PSU | 3,682 | (0.6) % | 4.4 % |
| FMCG | 27,127 | (1.4) % | 14.8 % | Real Estate | 345 | (0.0) % | 57.3 % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|-------|--------|------------|--------|---------|----------|
| A B B | 1,653 | 3.0 % | 25.1 % | Havells In | 522 | (5.5) % | 11.4 % |
| Bharti Inf | 352 | 2.1 % | 6.7 % | Tata Steel | 705 | (4.6) % | 52.3 % |
| Kotak Mah. | 1,109 | 1.9 % | 26.6 % | Bharat Ele | 169 | (4.3) % | 16.5 % |
| Tech Mahin | 613 | 1.6 % | 35.2 % | Dr Reddy's | 2,225 | (3.5) % | (18.9) % |
| GlaxoSmith | 6,643 | 1.6 % | 28.2 % | UPL | 752 | (2.4) % | 2.3 % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--|------------|-----------|--------|--------|----------------|
| Building Approvals (MoM) (DEC) | 01-02-2018 | 0:30 | AUD | - | 0.117 |
| Building Approvals (YoY) (DEC) | 01-02-2018 | 0:30 | AUD | - | 0.171 |
| Commodity Index AUD (JAN) | 01-02-2018 | 5:30 | AUD | - | 129.4 |
| Export Price Index (QoQ) (4Q) | 01-02-2018 | 0:30 | AUD | - | (0.03) |
| Import price index (QoQ) (4Q) | 01-02-2018 | 0:30 | AUD | - | (0.016) |
| RBA Commodity Index SDR (YoY) (JAN) | 01-02-2018 | 5:30 | AUD | - | (0.059) |
| MLI Leading Indicator (MoM) (DEC) | 01-02-2018 | 12:00 | CAD | - | 0.005 |
| RBC Canadian Manufacturing PMI (JAN) | 01-02-2018 | 14:30 | CAD | - | 54.7 |
| PMI Manufacturing (JAN) | 01-02-2018 | 8:30 | CHF | - | 65.2 |
| Retail Sales Real (YoY) (DEC) | 01-02-2018 | 8:15 | CHF | - | (0.002) |
| SECO Consumer Confidence (JAN) | 01-02-2018 | 6:45 | CHF | - | (2) |
| Caixin China PMI Mfg (JAN) | 01-02-2018 | 1:45 | CNY | - | 51.5 |
| ECB's Praet Speaks in Brussels | 01-02-2018 | 11:15 | EUR | - | - |
| Markit Eurozone Manufacturing PMI (JAN F) | 01-02-2018 | 9:00 | EUR | - | 59.6 |
| Markit France Manufacturing PMI (JAN F) | 01-02-2018 | 8:50 | EUR | - | 58.1 |
| Markit/ADACI Italy Manufacturing PMI (JAN) | 01-02-2018 | 8:45 | EUR | - | 57.4 |
| Markit/BME Germany Manufacturing PMI (JAN F) | 01-02-2018 | 8:55 | EUR | - | 61.2 |
| BOE's Brazier Speaks in London | 01-02-2018 | 17:30 | GBP | - | - |
| Markit UK PMI Manufacturing s.a. (JAN) | 01-02-2018 | 9:30 | GBP | - | 56.3 |
| Nationwide House PX (MoM) (JAN) | 01-02-2018 | 7:00 | GBP | - | 0.006 |
| Nationwide House Px n.s.a. (YoY) (JAN) | 01-02-2018 | 7:00 | GBP | - | 0.026 |
| Monetary Base (YoY) (JAN) | 01-02-2018 | 23:50 | JPY | - | 0.112 |
| Monetary Base End of period (JAN) | 01-02-2018 | 23:50 | JPY | - | - |
| Nikkei Japan PMI Manufacturing (JAN F) | 01-02-2018 | 0:30 | JPY | - | 54.4 |
| Vehicle Sales (YoY) (JAN) | 01-02-2018 | 5:00 | JPY | - | (0.01) |
| ANZ Consumer Confidence (MoM) (JAN) | 01-02-2018 | 21:00 | NZD | - | (0.015) |
| ANZ Consumer Confidence Index (JAN) | 01-02-2018 | 21:00 | NZD | - | 121.8 |
| Building Permits (MoM) (DEC) | 01-02-2018 | 21:45 | NZD | - | 0.108 |
| ... | ... | ... | ... | ... | ... |



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|---|------------|-------|-----|---|---------|
| Challenger Job Cuts (YoY) (JAN) | 01-02-2018 | 12:30 | USD | - | (0.036) |
| Construction Spending (MoM) (DEC) | 01-02-2018 | 15:00 | USD | - | 0.008 |
| Continuing Claims (JAN 20) | 01-02-2018 | 13:30 | USD | - | - |
| EIA Natural Gas Storage Change (JAN 26) | 01-02-2018 | 15:30 | USD | - | (288) |
| EIA Working Natural Gas Implied Flow (JAN 26) | 01-02-2018 | 15:30 | USD | - | (288) |
| Initial Jobless Claims (JAN 27) | 01-02-2018 | 13:30 | USD | - | - |
| ISM Employment (JAN) | 01-02-2018 | 15:00 | USD | - | 57 |
| ISM Manufacturing (JAN) | 01-02-2018 | 15:00 | USD | - | 59.7 |
| ISM New Orders (JAN) | 01-02-2018 | 15:00 | USD | - | 69.4 |
| ISM Prices Paid (JAN) | 01-02-2018 | 15:00 | USD | - | 69 |
| Markit US Manufacturing PMI (JAN F) | 01-02-2018 | 14:45 | USD | - | 55.5 |
| Nonfarm Productivity (4Q P) | 01-02-2018 | 13:30 | USD | - | 0.03 |
| Unit Labor Costs (4Q P) | 01-02-2018 | 13:30 | USD | - | (0.002) |

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