



02 Jan.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,436	0.0 %	13.0 %
BSE SENSEX	33,813	(0.7) %	13.0 %
CNX BANK	25,318	0.0 %	17.5 %
CNX MIDCAP	21,110	0.0 %	21.8 %
CNX SMALLCAP	9,178	0.0 %	29.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,719	(0.5) %	24.3 %
S&P 500	2,674	(0.5) %	18.4 %
FTSE 100	7,688	0.9 %	7.1 %
HANG SENG	29,919	0.2 %	35.1 %
NIKKEI	22,765	(0.1) %	16.2 %
SHANGHAI COMPOSITE	3,307	0.3 %	5.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	63.67	(0.6) %	0.0 %
EUR/USD	1.20	0.6 %	0.0 %
GBP/USD	1.35	0.5 %	0.0 %
USD/JPY	112.72	(0.0) %	0.0 %
USD/AUD	1.28	(0.3) %	0.0 %
USD/SGD	1.34	(0.1) %	0.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	1.0 %	15.5 %
Gold(INR/10g)	29,358	0.4 %	0.0 %
Gold Comex(USD/oz)	1,305	0.5 %	12.7 %
SILVER(INR/1Kg)	38,350	0.2 %	(1.5) %
Aluminium(USD/MT)	2,242	(0.2) %	31.7 %
Copper(USD/MT)	7,157	(0.8) %	28.4 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	(0.0) %	(0.1) %

**Global Economy:** Growth in China's manufacturing sector slowed slightly in December. The official Purchasing Managers' Index (PMI) released on Sunday dipped to 51.6 in December, down from 51.8 in November. The 50-point level divides growth from contraction on a monthly basis. The official non-manufacturing Purchasing Managers' Index (PMI) rose to a three-month high of 55 from 54.8 in November. The US dollar index is lingering around three month lows amid dull trading on the first session of the New Year 2018. Most major global markets are closed and the greenback is quoting just under 92 levels.

**Global Equities:** European and Asian stock markets remain closed due to New Year Holiday.

**Indian Economy:** The All-India Consumer Price Index For Industrial Workers (CPI-IW) for November, 2017 increased by 1 point and pegged at 288 (two hundred and eighty eight). On 1-month percentage change, it increased by (+) 0.35% between October, 2017 and November, 2017 when compared with the decrease of (-) 0.36% for the corresponding months of last year. The maximum upward pressure to the change in current index came from Food group contributing (+) 1.10 percentage points to the total change. The year-on-year inflation measured by monthly CPI-IW stood at 3.97% for November, 2017 as compared to 3.24% for the previous month and 2.59% during the corresponding month of the previous year. Similarly, the Food inflation stood at 3.91% against 2.26% of the previous month and 1.66% during the corresponding month of the previous year.

**Equity Markets:** A sharp correction was seen in late trades. Local indices slipped on the first trading day of this calendar year amid lack of global cues as major indices remained closed. Hefty pressure among IT stocks, financials, auto and oil & gas, dragged the market. Local indices have clocked handsome gains of around 28% in 2017. The Sensex settled at its lowest level in over 1-1/2 weeks and below the psychological 34,000 level. The Nifty hit two-week closing low. PSU bank stocks rose. Private bank stocks fell. Auto stocks declined. Stocks of telecom and telecom tower infrastructure providers declined.

**Corporate News:** SBI cut its base rate by 30 basis points. The nation's largest lender revised down the base rate to 8.65% for existing customers from 8.95%, while the BPLR is down from 13.70% to 13.40%. India is likely to see mergers and acquisitions (M&A) worth \$50 billion in 2018 on the back of plenty of stressed corporate assets on offer at tempting valuations. The ASSOCHAM Year Ahead Outlook observed that India's M&A transactions witnessed a jump of 170% in valuations and over 70% in the number of transactions in the year gone by.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	83.4	(38.9)	5.8
MF(INR cr)	1,012.1	407.6	580.6

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,240	32,240	32,191
F&O(INR cr)	294,485	294,485	619,177

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	11.0	10.3	10.9
NSE VIX	13.4	13.4	12.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,318	(0.9) %	17.5 %	Energy	14,139	(0.8) %	19.6 %
IT	11,566	(0.9) %	9.2 %	Pharma	9,618	(0.0) %	(8.4) %
Metals	3,919	(0.5) %	26.2 %	Finance	10,374	(1.0) %	17.5 %
Auto	11,891	(1.0) %	19.9 %	PSU	3,679	(0.6) %	4.3 %
FMCG	26,686	(0.6) %	12.9 %	Real Estate	348	0.2 %	58.7 %

### NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Tata Power	97	3.9 %	8.9 %	Idea Cellu	105	(3.3) %	22.9 %
B H E L	95	2.9 %	(14.5) %	Bharti Inf	370	(2.3) %	12.3 %
NMDC	141	2.4 %	5.5 %	TCS	2,646	(2.1) %	9.7 %
Indiabulls	1,218	1.8 %	22.3 %	Torrent Ph	1,390	(2.0) %	(7.6) %
Rural Elec	158	1.7 %	(11.9) %	Bosch	19,792	(1.9) %	(12.6) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Commodity Index AUD (DEC)	02-01-2018	5:30	AUD	-	125.6
RBA Commodity Index SDR (YoY) (DEC)	02-01-2018	5:30	AUD	-	(0.033)
MLI Leading Indicator (MoM) (NOV)	02-01-2018	12:00	CAD	-	0.004
RBC Canadian Manufacturing PMI (DEC)	02-01-2018	14:30	CAD	-	54.4
Caixin China PMI Mfg (DEC)	02-01-2018	1:45	CNY	-	50.8
Markit Eurozone Manufacturing PMI (DEC F)	02-01-2018	9:00	EUR	-	60.6
Markit France Manufacturing PMI (DEC F)	02-01-2018	8:50	EUR	-	59.3
Markit/ADACI Italy Manufacturing PMI (DEC)	02-01-2018	8:45	EUR	-	58.3
Markit/BME Germany Manufacturing PMI (DEC F)	02-01-2018	8:55	EUR	-	63.3
Markit UK PMI Manufacturing s.a. (DEC)	02-01-2018	9:30	GBP	-	58.2
Markit US Manufacturing PMI (DEC F)	02-01-2018	14:45	USD	-	55
U.S. to Sell USD20 Bln 52-Week Bills	02-01-2018	16:30	USD	-	-
U.S. to Sell USD42 Bln 6-Month Bills	02-01-2018	16:30	USD	-	-
U.S. to Sell USD48 Bln 3-Month Bills	02-01-2018	16:30	USD	-	-
U.S. to Sell USD50 Bln 4-Week Bills	02-01-2018	16:30	USD	-	-

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