



03 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,442	0.1 %	13.0 %
BSE SENSEX	33,812	(0.0) %	13.0 %
CNX BANK	25,338	0.1 %	17.6 %
CNX MIDCAP	20,960	(0.7) %	20.9 %
CNX SMALLCAP	9,109	(0.8) %	28.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,824	0.4 %	0.0 %
S&P 500	2,696	0.8 %	0.0 %
FTSE 100	7,648	(0.5) %	0.0 %
HANG SENG	30,515	2.0 %	0.0 %
NIKKEI	22,765	(0.1) %	16.2 %
SHANGHAI COMPOSITE	3,348	1.2 %	0.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.48	(0.6) %	(0.3) %
EUR/USD	1.20	0.4 %	0.3 %
GBP/USD	1.36	0.6 %	0.6 %
USD/JPY	112.34	(0.3) %	(0.3) %
USD/AUD	1.28	(0.1) %	0.0 %
USD/SGD	1.33	(0.4) %	(0.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	1.0 %	15.5 %
Gold(INR/10g)	29,407	0.2 %	0.2 %
Gold Comex(USD/oz)	1,309	0.3 %	0.0 %
SILVER(INR/1Kg)	38,604	0.7 %	0.0 %
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: Eurozone manufacturing sector activity grew the most since the survey began in mid-1997, final data from IHS Markit showed Tuesday. The factory Purchasing Managers' Index improved to 60.6 in December, in line with flash estimate, from 60.1 in November. This was the highest score since mid-1997 and identical to the flash estimate published on December 14. China's Caixin Purchasing Managers' Index for the factory sector rose to 51.5 in December from 50.8 in November, survey data from IHS Markit showed Tuesday. Any reading above 50 indicates expansion in the sector. Among components, output, new orders and export sales all grew at stronger rates in December. The UK manufacturing growth eased more in December, data published by IHS Markit showed. The IHS Markit/Chartered Institute of Procurement & Supply Purchasing Managers' Index fell to 56.3 in December from November's 51-month high of 58.2. The headline PMI has now remained above the 50.0 no-change mark for 17 consecutive months.

Global Equities: US stocks edged up as technology and health care companies supported sentiments on the first session of the year.

Indian Economy: The Insolvency and Bankruptcy Board of India (IBBI) has amended (i) the Insolvency and Bankruptcy Board of India (Insolvency Resolution Process for Corporate Persons) Regulations, 2016, and (ii) the Insolvency and Bankruptcy Board of India (Fast Track Insolvency Resolution Process for Corporate Persons) Regulations, 2017 on 31 December 2017. According to the Regulations, a Resolution Plan needs to identify specific sources of funds to be used for paying the liquidation value due to dissenting creditors. For this purpose, the 'Dissenting Financial Creditor', according to amended Regulations, means a financial creditor who voted against the Resolution Plan or abstained from voting for the Resolution Plan, approved by the Committee of Creditors.

Equity Markets: Key benchmark indices settled almost unchanged in a choppy session of trade amid divergent trend in index pivotals. PSU bank stocks fell. Private bank stocks saw mixed trend. Auto stocks were mixed. Telecom stocks declined. The market breadth, indicating the overall health of the market, was negative. On BSE, 1,689 shares fell and 1,152 shares rose. A total of 113 shares were unchanged. Breadth was strong in early trade.

Corporate News: Reliance Industries Limited (RIL) has successfully commissioned and achieved design throughput of the world's first ever and largest Refinery Off-Gas Cracker (ROGC) complex of 1.5 MMTPA capacity along with downstream plants and utilities. NTPC has recorded 10.39% jump in electricity generation in the third quarter this fiscal, the company said in a statement. The highest ever quarterly generation of 67,781 million units (MUs) was recorded during Q3 of 2017-18 against 61,400 MUs recorded during the corresponding period of last year, the company said. Nikkei India Manufacturing Purchasing Manager's Index (PMI) rose to 54.7 in December 2017 from 52.6 in November on the back of robust improvement in the health of the sector since December 2012. A reading above 50 indicates expansion and one below 50 shows contraction in production. The upward movement in the headline index was driven by a sharp increase in output.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(1.8)	(1.8)	5.7
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)	36,960	34,600	32,216
F&O(INR cr)	525,119	409,802	618,677

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	11.0	0	10.9
NSE VIX	13.7	13.5	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	25,338	0.1 %	17.6 %	Energy	14,162	0.2 %	19.8 %
IT	11,602	0.3 %	9.5 %	Pharma	9,566	(0.5) %	(8.9) %
Metals	3,943	0.6 %	27.0 %	Finance	10,398	0.2 %	17.8 %
Auto	11,927	0.3 %	20.2 %	PSU	3,624	(1.5) %	2.8 %
FMCG	26,534	(0.6) %	12.2 %	Real Estate	344	(1.1) %	56.9 %

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>
NMDC	149	5.4 %	11.1 %	Eicher Mot	28,670	(4.1) %	12.2 %
Tata Motor	253	4.4 %	(10.0) %	Idea Cellu	101	(3.7) %	18.3 %
Ashok Leyl	123	4.0 %	46.7 %	Indiabulls	1,184	(2.8) %	18.8 %
Tata Motor	439	3.5 %	(6.6) %	Bank of Ba	158	(2.2) %	(8.4) %
B H E L	98	3.2 %	(11.8) %	Bharti Air	517	(2.2) %	51.1 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
AiG Performance of Service Index (DEC)	03-01-2018	22:30	AUD	-	51.7
CBA Australia PMI Composite (DEC)	03-01-2018	22:00	AUD	-	54.3
CBA Australia PMI Services (DEC)	03-01-2018	22:00	AUD	-	54
Domestic Sight Deposits CHF (DEC 29)	03-01-2018	9:00	CHF	-	-
PMI Manufacturing (DEC)	03-01-2018	8:30	CHF	-	65.1
Total Sight Deposits CHF (DEC 29)	03-01-2018	9:00	CHF	-	-
German Unemployment Change (000's) (DEC)	03-01-2018	8:55	EUR	-	-
German Unemployment Claims Rate s.a. (DEC)	03-01-2018	8:55	EUR	-	0.056
Markit/CIPS UK Construction PMI (DEC)	03-01-2018	9:30	GBP	-	53.1
Construction Spending (MoM) (NOV)	03-01-2018	15:00	USD	-	0.014
FOMC Meeting Minutes (DEC 13)	03-01-2018	19:00	USD	-	-
ISM Employment (DEC)	03-01-2018	15:00	USD	-	59.7
ISM Manufacturing (DEC)	03-01-2018	15:00	USD	-	58.2
ISM New Orders (DEC)	03-01-2018	15:00	USD	-	64
ISM Prices Paid (DEC)	03-01-2018	15:00	USD	-	65.5
MBA Mortgage Applications (DEC 29)	03-01-2018	12:00	USD	-	(0.049)

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