



04 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,443	0.0 %	13.0 %
BSE SENSEX	33,793	(0.1) %	13.0 %
CNX BANK	25,319	(0.1) %	17.5 %
CNX MIDCAP	21,101	0.7 %	21.7 %
CNX SMALLCAP	9,226	1.3 %	30.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,923	0.4 %	0.4 %
S&P 500	2,713	0.6 %	0.6 %
FTSE 100	7,671	0.3 %	0.3 %
HANG SENG	30,561	0.2 %	0.1 %
NIKKEI	22,765	(0.1) %	16.2 %
SHANGHAI COMPOSITE	3,369	0.6 %	0.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.53	(0.2) %	(0.2) %
EUR/USD	1.20	0.1 %	0.1 %
GBP/USD	1.35	0.0 %	0.0 %
USD/JPY	112.69	(0.0) %	(0.0) %
USD/AUD	1.28	(0.1) %	(0.1) %
USD/SGD	1.33	(0.3) %	(0.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	(0.1) %	0.0 %
Gold(INR/10g)	29,407	0.2 %	0.2 %
Gold Comex(USD/oz)	1,314	0.4 %	0.4 %
SILVER(INR/1Kg)	38,575	(0.1) %	(0.1) %
Aluminium(USD/MT)	2,256	0.6 %	0.0 %
Copper(USD/MT)	7,181	0.3 %	0.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	0.1 %	0.0 %

Global Economy: The Institute for Supply Management released a report on Wednesday showing growth in US manufacturing activity unexpectedly accelerated in the month of December. The ISM said its purchasing managers index rose to 59.7 in December. Stubbornly weak inflation could slow the pace of interest rate hikes in 2018, the minutes of the most recent Federal Reserve meeting reflected. At that meeting, the Fed voted to increase its benchmark interest rate a quarter point to 1.25% to 1.5%. The information reviewed for the December 12-13 meeting indicated that labor market conditions continued to strengthen through November and suggested that real gross domestic product (GDP) was rising at a solid pace in the second half of 2017. The Fed also said it raised its economic projections due to the tax reforms passed by the Trump Administration.

Global Equities: US stocks edged up amid supportive economic data. With the continued upward move on the day, the major averages climbed to fresh record closing highs.

Indian Economy: Local Sugar mills produced 10.33 million tonnes (mt) till December 31, which is 26 per cent higher than the 8.2 mt produced during the corresponding period of the previous season, a release from the Indian Sugar Mills' Association (ISMA) said on Wednesday. The sugar year starts in October and runs till September of the next year. Sugarcane crushing is on in 485 mills, of which 180 are in Maharashtra and 116 in Uttar Pradesh. During the same period last year, only 441 mills were operational. Maharashtra's mills have so far produced 3.8 mt of sugar, while those in UP accounted for 3.33 mt.

Equity Markets: The Sensex closed with small losses while the Nifty settled a tad higher as stocks erased early gains in volatile trading session. The losses pushed the Sensex to its lowest closing in three weeks. PSU bank stocks rose. Private bank stocks saw mixed trend. Metal shares were in demand. Realty stocks gained. Key indices entered negative terrain and hit fresh intraday low in mid-afternoon trade yesterday.

Corporate News: The Union Cabinet chaired by the Prime Minister Narendra Modi has approved the signing and implementation of the Memorandum of Understanding (MoU) between Ministry of Road Transport & Highways and 'Transport for London', a statutory body established under the Greater London Authority Act, 1999 (UK) to improve Public Transport in India. Following over a 94 per cent jump in net profit, National Aluminium Company Limited, has lined up projects with an investment of about Rs 25,000 crore. Tata Motors and Greaves Cotton have entered into agreements with foreign companies to develop and supply less-polluting engines, as India's automotive industry is preparing itself to meet Bharat Stage-VI emission standards before they come into effect two years from now.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	97.3	47.8	6.2
MF(INR cr)	1,012.1	407.6	580.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,076	35,759	32,248
F&O(INR cr)	574,382	464,662	618,442

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.8	9.8	10.9
NSE VIX	13.6	13.6	12.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,319	(0.1) %	17.5 %	Energy	14,158	(0.0) %	19.8 %
IT	11,587	(0.1) %	9.4 %	Pharma	9,520	(0.5) %	(9.4) %
Metals	4,000	1.5 %	28.8 %	Finance	10,386	(0.1) %	17.7 %
Auto	11,867	(0.5) %	19.6 %	PSU	3,623	(0.0) %	2.8 %
FMCG	26,648	0.4 %	12.7 %	Real Estate	345	0.5 %	57.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oracle Fin	4,163	4.1 %	10.0 %	Dr Reddy's	2,339	(2.9) %	(14.8) %
Pidilite I	914	2.8 %	30.0 %	Wipro	310	(2.7) %	22.2 %
NHPC Ltd	33	2.7 %	1.4 %	ONGC	193	(1.7) %	4.1 %
Adani Port	408	2.6 %	19.2 %	Bajaj Auto	3,241	(1.6) %	16.4 %
SAIL	94	2.1 %	48.7 %	Marico	321	(1.5) %	8.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Industrial Product Price (MoM) (NOV)	04-01-2018	13:30	CAD	-	0.01
Raw Materials Price Index (MoM) (NOV)	04-01-2018	13:30	CAD	-	0.038
Caixin China PMI Composite (DEC)	04-01-2018	1:45	CNY	-	51.6
Caixin China PMI Services (DEC)	04-01-2018	1:45	CNY	-	51.9
Markit Eurozone Composite PMI (DEC F)	04-01-2018	9:00	EUR	-	58
Markit Eurozone Services PMI (DEC F)	04-01-2018	9:00	EUR	-	56.5
Markit France Composite PMI (DEC F)	04-01-2018	8:50	EUR	-	60
Markit France Services PMI (DEC F)	04-01-2018	8:50	EUR	-	59.4
Markit Germany Services PMI (DEC F)	04-01-2018	8:55	EUR	-	55.8
Markit/ADACI Italy Composite PMI (DEC)	04-01-2018	8:45	EUR	-	56
Markit/ADACI Italy Services PMI (DEC)	04-01-2018	8:45	EUR	-	54.7
Markit/BME Germany Composite PMI (DEC F)	04-01-2018	8:55	EUR	-	58.7
M4 Ex IOFCs 3M Annualised (NOV)	04-01-2018	9:30	GBP	-	0.054
M4 Money Supply (YoY) (NOV)	04-01-2018	9:30	GBP	-	0.041
Markit/CIPS UK Composite PMI (DEC)	04-01-2018	9:30	GBP	-	54.9
Markit/CIPS UK Services PMI (DEC)	04-01-2018	9:30	GBP	-	53.8
Money Supply M4 (MoM) (NOV)	04-01-2018	9:30	GBP	-	0.006
Mortgage Approvals (NOV)	04-01-2018	9:30	GBP	-	-
Nationwide House PX (MoM) (DEC)	04-01-2018	7:00	GBP	-	0.001
Nationwide House Px n.s.a. (YoY) (DEC)	04-01-2018	7:00	GBP	-	0.025
Net Consumer Credit (NOV)	04-01-2018	9:30	GBP	-	-
Net Lending Sec. on Dwellings (NOV)	04-01-2018	9:30	GBP	-	-
Official Reserves (Changes) (DEC)	04-01-2018	9:30	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	04-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	04-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	04-01-2018	1:10	JPY	-	-
Loans & Discounts Corp (YoY) (NOV)	04-01-2018	23:50	JPY	-	0.0354
Monetary Base (YoY) (DEC)	04-01-2018	23:50	JPY	-	0.132
Monetary Base End of period (DEC)	04-01-2018	23:50	JPY	-	-



Nikkei Japan PMI Manufacturing (DEC F)	04-01-2018	0:30	JPY	-	54.2
ADP Employment Change (DEC)	04-01-2018	13:15	USD	-	-
Challenger Job Cuts (YoY) (DEC)	04-01-2018	12:30	USD	-	0.301
Continuing Claims (DEC 23)	04-01-2018	13:30	USD	-	-
DOE Cushing OK Crude Inventory (DEC 29)	04-01-2018	16:00	USD	-	-
DOE U.S. Crude Oil Inventories (DEC 29)	04-01-2018	16:00	USD	-	-
DOE U.S. Distillate Inventory (DEC 29)	04-01-2018	16:00	USD	-	-
DOE U.S. Gasoline Inventories (DEC 29)	04-01-2018	16:00	USD	-	-
EIA Natural Gas Storage Change (DEC 29)	04-01-2018	15:30	USD	-	(112)
EIA Working Natural Gas Implied Flow (DEC 29)	04-01-2018	15:30	USD	-	(112)
Fed's Bullard Speaks at Economics Convention in Philadelphia	04-01-2018	18:30	USD	-	-
Initial Jobless Claims (DEC 30)	04-01-2018	13:30	USD	-	-
Markit US Composite PMI (DEC F)	04-01-2018	14:45	USD	-	53
Markit US Services PMI (DEC F)	04-01-2018	14:45	USD	-	52.4

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