



05 Jan.2018

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,543	0.4 %	14.1 %
BSE SENSEX	33,970	0.5 %	13.7 %
CNX BANK	25,463	0.0 %	18.2 %
CNX MIDCAP	21,308	0.0 %	22.9 %
CNX SMALLCAP	9,310	0.0 %	31.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,075	0.6 %	1.0 %
S&P 500	2,724	0.4 %	1.0 %
FTSE 100	7,696	0.3 %	0.6 %
HANG SENG	30,736	0.6 %	0.7 %
NIKKEI	23,506	3.3 %	0.0 %
SHANGHAI COMPOSITE	3,386	0.5 %	1.1 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.41	(0.1) %	(0.4) %
EUR/USD	1.21	0.2 %	0.5 %
GBP/USD	1.36	(0.2) %	0.3 %
USD/JPY	112.81	0.4 %	0.1 %
USD/AUD	1.27	(0.3) %	(0.3) %
USD/SGD	1.33	(0.2) %	(0.6) %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	2.7 %	2.7 %
Gold(INR/10g)	29,407	0.2 %	0.2 %
Gold Comex(USD/oz)	1,308	(0.5) %	(0.1) %
SILVER(INR/1Kg)	38,452	(0.3) %	(0.4) %
Aluminium(USD/MT)	2,241	(0.7) %	(0.7) %
Copper(USD/MT)	7,116	(0.9) %	(0.9) %

## FIXED INCOME

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

**Global Economy:** A report released by payroll processor ADP on Thursday showed private sector employment in the US soared much more than expected in the month of December. ADP said employment in the private sector surged up by 250,000 jobs in December after climbing by a downwardly revised 185,000 jobs in November. British services activity growth exceeded expectations at the end of 2017 despite the Brexit-related uncertainty weighing on business investment. The IHS Markit/Chartered Institute of Procurement & Supply services Purchasing Managers' Index rose to 54.2 in December from 53.8 in November, survey data from IHS Markit showed Thursday.

**Global Equities:** US stocks hit another record high on supportive jobs data and rising commodity prices.

**Indian Economy:** Following a decline in November, the Indian service sector returned to marginal growth during December as new orders broadly stabilised. Though solid overall, cost inflationary pressures also eased from November's recent-high, whilst business expectations remained positive. Reflecting improvements in output requirements, job creation quickened to the fastest since September. From 48.5 in November to 50.9 in December, the seasonally adjusted Business Activity Index signalled a renewed increase in activity following a decline in November.

**Equity Markets:** The local stocks closed with modest gains as positive cues from global markets boosted investor sentiment. Shares of PSU banks advanced after report suggested that the government was seeking to take Parliament's nod for additional Rs 80000 crore bonds aimed at recapitalising the ailing public sector banks. Metal shares were in demand after positive services data from China.

**Corporate News:** Bharti Airtel said that the company and Samsung announced a strategic alliance to bring a range of affordable 4G smartphone options to customers. As a part of this alliance, four top models from Samsung's popular Galaxy J-series range will be available with attractive cashback offers, bringing down the effective price of the device and making them highly affordable for customers. Indian Overseas Bank said that board of directors approved to utilize the balance available in the share premium account amounting to Rs 7650.06 crore as at 31 March 2017 to write off the accumulated losses of the bank aggregating to Rs 6978.94 crore as at 31 March 2017 to present a true and fair view of the financial position of the bank and to take the same into account during current Financial Year 2017-18. South India Bank said that the meeting of the board of directors of the bank is scheduled to be held on 9th January 2018 to also consider a proposal to augment the paid-up capital by issue of equity shares or other securities convertible into equity shares, through one or more modes permissible under applicable laws including but not limited to, preferential allotment, qualified institutions placement, rights issue or public issue, for an amount not exceeding Rs 20 crore in nominal value, subject to the approval of regulatory authorities if any



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	17.8	37.8	6.3
MF(INR cr)	1,208.5	416.7	576.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	42,474	37,438	32,302
F&O(INR cr)	1,036,180	607,541	620,641

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.2	9.5	10.9
NSE VIX	13.4	13.5	12.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,463	0.6 %	18.2 %	Energy	14,247	0.6 %	20.5 %
IT	11,591	0.0 %	9.4 %	Pharma	9,634	1.2 %	(8.3) %
Metals	4,112	2.8 %	32.4 %	Finance	10,429	0.4 %	18.2 %
Auto	11,843	(0.2) %	19.4 %	PSU	3,720	2.7 %	5.5 %
FMCG	26,690	0.2 %	12.9 %	Real Estate	345	(0.2) %	57.4 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Punjab Nat	176	5.9 %	17.7 %	Oracle Fin	4,061	(2.5) %	7.3 %
Cummins In	973	4.5 %	1.2 %	Tata Power	100	(1.2) %	11.7 %
SAIL	98	4.4 %	55.2 %	Britannia	4,626	(1.2) %	36.4 %
Titan Comp	893	4.3 %	94.4 %	P & G Hygi	9,310	(1.1) %	26.0 %
Bank of Ba	164	3.8 %	(4.9) %	Piramal En	2,819	(1.1) %	45.6 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Trade Balance (NOV)	05-01-2018	0:30	AUD	-	-
Full Time Employment Change (DEC)	05-01-2018	13:30	CAD	-	29.6
International Merchandise Trade (Canadian dollar) (NOV)	05-01-2018	13:30	CAD	-	-
Ivey Purchasing Managers Index s.a. (DEC)	05-01-2018	15:00	CAD	-	63
Net Change in Employment (DEC)	05-01-2018	13:30	CAD	-	-
Part Time Employment Change (DEC)	05-01-2018	13:30	CAD	-	49.9
Participation Rate (DEC)	05-01-2018	13:30	CAD	-	65.7
Unemployment Rate (DEC)	05-01-2018	13:30	CAD	-	0.059
Foreign Currency Reserves (DEC)	05-01-2018	8:00	CHF	-	-
Euro-Zone Consumer Price Index Core (YoY) (DEC A)	05-01-2018	10:00	EUR	-	0.009
Euro-Zone Consumer Price Index Estimate (YoY) (DEC)	05-01-2018	10:00	EUR	-	0.015
Euro-Zone Producer Price Index (MoM) (NOV)	05-01-2018	10:00	EUR	-	0.004
Euro-Zone Producer Price Index (YoY) (NOV)	05-01-2018	10:00	EUR	-	0.025
German Retail Sales (MoM) (NOV)	05-01-2018	7:00	EUR	-	(0.012)
German Retail Sales (YoY) (NOV)	05-01-2018	7:00	EUR	-	(0.014)
Markit Eurozone Retail PMI (DEC)	05-01-2018	9:10	EUR	-	52.4
Markit France Retail PMI (DEC)	05-01-2018	9:10	EUR	-	52.2
Markit Germany Construction PMI (DEC)	05-01-2018	8:30	EUR	-	53.1
Markit Germany Retail PMI (DEC)	05-01-2018	9:10	EUR	-	54.6
Markit Italy Retail PMI (DEC)	05-01-2018	9:10	EUR	-	49.2
BRC Shop Price Index (YoY) (DEC)	05-01-2018	0:01	GBP	-	(0.001)
New Car Registrations (YoY) (DEC)	05-01-2018	9:00	GBP	-	(0.112)
Unit Labor Costs (YoY) (3Q)	05-01-2018	9:30	GBP	-	0.016
Nikkei Japan PMI Composite (DEC)	05-01-2018	0:30	JPY	-	52.2
Nikkei Japan PMI Services (DEC)	05-01-2018	0:30	JPY	-	51.2
Vehicle Sales (YoY) (DEC)	05-01-2018	5:00	JPY	-	(0.054)
Average Hourly Earnings (MoM) (DEC)	05-01-2018	13:30	USD	-	0.002
Average Hourly Earnings (YoY) (DEC)	05-01-2018	13:30	USD	-	0.025
Average Weekly Hours All Employees (DEC)	05-01-2018	13:30	USD	-	0.15



Baker Hughes U.S. Rig Count (JAN 05)	05-01-2018	18:00	USD	-	929
Cap Goods Orders Nondef Ex Air (NOV F)	05-01-2018	15:00	USD	-	(0.001)
Cap Goods Ship Nondef Ex Air (NOV F)	05-01-2018	15:00	USD	-	0.003
Change in Manufact. Payrolls (DEC)	05-01-2018	13:30	USD	-	-
Change in Non-farm Payrolls (DEC)	05-01-2018	13:30	USD	-	-
Change in Private Payrolls (DEC)	05-01-2018	13:30	USD	-	-
Durable Goods Orders (NOV F)	05-01-2018	15:00	USD	-	0.013
Durables Ex Transportation (NOV F)	05-01-2018	15:00	USD	-	(0.001)
Factory Orders (NOV)	05-01-2018	15:00	USD	-	(0.001)
Factory Orders Ex Trans (NOV)	05-01-2018	15:00	USD	-	0.008
Fed's Harker Speaks on the Economic Outlook at AEA	05-01-2018	15:15	USD	-	-
Fed's Mester Speaks on Panel on Monetary Policy Coordination	05-01-2018	17:30	USD	-	-
ISM Non-Manufacturing/Services Composite (DEC)	05-01-2018	15:00	USD	-	57.4
Labor Force Participation Rate (DEC)	05-01-2018	13:30	USD	-	0.627
Revisions: Seasonally Adjusted Household Survey data	05-01-2018	13:30	USD	-	-
Trade Balance (NOV)	05-01-2018	13:30	USD	-	-
Two-Month Payroll Net Revision (DEC)	05-01-2018	13:30	USD	-	-
Underemployment Rate (DEC)	05-01-2018	13:30	USD	-	0.08
Unemployment Rate (DEC)	05-01-2018	13:30	USD	-	0.041

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