



05 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,761	(2.3) %	16.5 %
BSE SENSEX	35,067	(2.3) %	17.2 %
CNX BANK	26,451	(2.8) %	22.8 %
CNX MIDCAP	19,760	(4.3) %	14.0 %
CNX SMALLCAP	8,251	(6.1) %	16.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,521	(2.5) %	2.8 %
S&P 500	2,762	(2.1) %	2.5 %
FTSE 100	7,443	(0.6) %	(2.7) %
HANG SENG	32,602	(0.1) %	6.8 %
NIKKEI	23,275	(0.9) %	(1.0) %
SHANGHAI COMPOSITE	3,462	0.4 %	3.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.06	0.1 %	0.6 %
EUR/USD	1.25	(0.2) %	3.8 %
GBP/USD	1.41	(1.0) %	4.5 %
USD/JPY	110.17	0.6 %	(2.3) %
USD/AUD	1.26	1.1 %	(1.4) %
USD/SGD	1.32	0.6 %	(1.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(0.5) %	8.4 %
Gold(INR/10g)	30,452	0.5 %	3.7 %
Gold Comex(USD/oz)	1,335	(1.2) %	2.0 %
SILVER(INR/1Kg)	39,200	(0.1) %	1.5 %
Aluminium(USD/MT)	2,228	0.5 %	(1.2) %
Copper(USD/MT)	7,066	0.6 %	(1.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.1 %	0.4 %

Global Economy: Nonfarm employment in the US rose by more than expected in the month of January, according to the Labor Department. The non-farm payroll employment surged up by 200,000 jobs in January after rising by an upwardly revised 160,000 jobs in December. While the job growth in December was upwardly revised, the jump in employment in November was downwardly revised to 216,000 jobs from 252,000 jobs, reflecting a net downward revision of 24,000 jobs over the two months. The report said the unemployment rate came in at 4.1% in January, unchanged from the three previous months. The unemployment rate remained at a seventeen-year low as the labor force expanded by 518,000 people, offsetting an increase in the household survey measure of employment of 409,000 people. The labor department also noted that wages rose 2.9% on an annualized basis, highlighting the inflationary worries and pushing up bond yields.

Global Equities: Global stocks are likely to be in for a continued round of selloff following heavy losses in US equities on Friday. DOW crashed more than 600 points, capping worst week in 2 years.

Indian Economy: The All-India Consumer Price Index for Industrial Workers (CPI-IW) for December, 2017 decreased by 2 points and pegged at 286 (two hundred and eighty six). On one-month percentage change, it decreased by (-) 0.69% between November, 2017 and December, 2017 when compared with the decrease of (-) 0.72% for the corresponding months of last year. The year-on-year inflation measured by monthly CPI-IW stood at 4% for December, 2017 as compared to 3.97% for the previous month and 2.23% during the corresponding month of the previous year. Similarly, the Food inflation stood at 4.32% against 3.91% of the previous month and 0.67% during the corresponding month of the previous year.

Equity Markets: The local market corrected sharply as introduction of long-term capital gains tax (LTCG) in the Union Budget 2018-19. The Nifty settled below the psychological 11,000 mark. The Sensex and the Nifty, both, settled at their lowest closing levels in more than two weeks. Investors were also miffed as the fiscal deficit target for FY2018 was extended to 3.5% of GDP in the Budget, from 3.2% pegged earlier. Negative cues from global markets also spoiled sentiment. Realty and banks shares suffered major losses.

Corporate News: Godrej Properties has sold 2 lakh sq ft area in its commercial building at Bandra- Kurla complex in Mumbai for nearly Rs 700 crore so far this fiscal riding on the demand for prime rent-yielding assets, according to media reports. Reliance Industries Chairman Mukesh Ambani announced an investment of Rs 2,500 crore in Assam in various sectors, including retail, petroleum, telecom, tourism and sports. The company plans to create jobs for at least 80,000 people over the next three years. State-run Union Bank of India reported a net loss of Rs 1,250 crore in the December quarter as against a net profit of Rs 104 crore a year ago. The bank's bad loan provisions for the quarter jumped to Rs 2,521 crore from Rs1,582 crore a year ago as its gross non-performing assets rose to 13% from 11.70%, and net NPAs edged up to 6.96% from 6.95%.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	183.3	183.3	15.9
MF(INR cr)	1,050.9	350.1	553.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	53,418	50,443	33,305
F&O(INR cr)	724,402	1,116,623	636,832

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.3	15.4	10.9
NSE VIX	15.3	14.7	12.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,451	(2.8) %	22.8 %	Energy	13,775	(3.4) %	16.5 %
IT	12,984	0.1 %	22.6 %	Pharma	9,043	(1.3) %	(13.9) %
Metals	3,948	(3.0) %	27.1 %	Finance	10,887	(3.1) %	23.4 %
Auto	11,302	(3.3) %	13.9 %	PSU	3,493	(2.9) %	(0.9) %
FMCG	27,180	(0.6) %	15.0 %	Real Estate	321	(6.2) %	46.4 %

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>
Tech Mahin	619	1.4 %	36.7 %	DLF	223	(8.8) %	52.1 %
HCL Techno	991	0.6 %	14.4 %	Cummins In	829	(8.2) %	(13.8) %
Bank of Ba	153	0.6 %	(11.1) %	B H E L	94	(6.8) %	(16.0) %
TCS	3,154	0.5 %	30.8 %	S A I L	84	(6.4) %	32.5 %
Glaxosmi.	2,468	0.4 %	(9.8) %	NMDC	133	(6.3) %	(0.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

..... End of Report