



06 Feb.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,667	(0.9) %	15.5 %
BSE SENSEX	34,757	(0.9) %	16.2 %
CNX BANK	26,099	(1.3) %	21.1 %
CNX MIDCAP	19,722	(0.2) %	13.8 %
CNX SMALLCAP	8,314	0.8 %	17.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,346	(4.6) %	(1.9) %
S&P 500	2,649	(4.1) %	(1.7) %
FTSE 100	7,335	(1.5) %	(4.1) %
HANG SENG	32,245	(1.1) %	5.7 %
NIKKEI	22,682	(2.6) %	(3.5) %
SHANGHAI COMPOSITE	3,488	0.7 %	4.2 %

**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)	30,267	(0.6) %	3.1 %
Gold Comex(USD/oz)	1,335	(1.2) %	2.0 %
SILVER(INR/1Kg)	38,710	(1.3) %	0.3 %
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

	LATEST	MTD	YTD
FII(USD mm)	201.3	192.3	16.8
MF(INR cr)	1,050.9	350.1	553.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	41,658	47,514	33,345
F&O(INR cr)	589,595	940,947	636,608

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.3	15.4	10.9
NSE VIX	16.1	15.1	12.5

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,099	(1.3) %	21.1 %	Energy	13,766	(0.1) %	16.5 %
IT	12,937	(0.4) %	22.1 %	Pharma	9,070	0.3 %	(13.7) %
Metals	3,927	(0.6) %	26.4 %	Finance	10,685	(1.9) %	21.1 %
Auto	11,386	0.7 %	14.8 %	PSU	3,513	0.6 %	(0.4) %
FMCG	27,192	0.0 %	15.0 %	Real Estate	319	(0.5) %	45.8 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Ashok Leyl	129	5.8 %	53.8 %	H D F C	1,823	(4.2) %	18.9 %
Bharti Air	440	4.2 %	28.8 %	Larsen & T	1,364	(3.7) %	23.1 %
Tata Motor	396	3.1 %	(15.9) %	A B B	1,628	(3.0) %	23.2 %
Bank of Ba	158	2.8 %	(8.6) %	Marico	295	(3.0) %	(0.4) %
H P C L	384	2.5 %	11.0 %	IndusInd B	1,713	(2.7) %	22.1 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (JAN)	06-02-2018	22:30	AUD	-	52.8
RBA Cash Rate Target (6 FEB)	06-02-2018	3:30	AUD	-	0.015
Retail Sales (MoM) (DEC)	06-02-2018	0:30	AUD	-	0.012
Retail Sales Ex Inflation (QoQ) (4Q)	06-02-2018	0:30	AUD	-	0.001
Trade Balance (DEC)	06-02-2018	0:30	AUD	-	-
International Merchandise Trade (Canadian dollar) (DEC)	06-02-2018	13:30	CAD	-	-
Ivey Purchasing Managers Index s.a. (JAN)	06-02-2018	15:00	CAD	-	60.4
German Factory Orders (MoM) (DEC)	06-02-2018	7:00	EUR	-	(0.004)
German Factory Orders n.s.a. (YoY) (DEC)	06-02-2018	7:00	EUR	-	0.087
Markit Eurozone Retail PMI (JAN)	06-02-2018	9:10	EUR	-	53
Markit France Retail PMI (JAN)	06-02-2018	9:10	EUR	-	53
Markit Germany Construction PMI (JAN)	06-02-2018	8:30	EUR	-	53.7
Markit Germany Retail PMI (JAN)	06-02-2018	9:10	EUR	-	55.1
Markit Italy Retail PMI (JAN)	06-02-2018	9:10	EUR	-	49.5
BRC Sales Like-For-Like (YoY) (JAN)	06-02-2018	0:01	GBP	-	0.006
New Car Registrations (YoY) (JAN)	06-02-2018	9:00	GBP	-	(0.144)
Official Reserve Assets (JAN)	06-02-2018	23:50	JPY	-	-
Average Hourly Earnings (QoQ) (4Q)	06-02-2018	21:45	NZD	-	0.012
Employment Change (QoQ) (4Q)	06-02-2018	21:45	NZD	-	0.022
Employment Change (YoY) (4Q)	06-02-2018	21:45	NZD	-	0.042
Labor Cost Private Sector (QoQ) (4Q)	06-02-2018	21:45	NZD	-	0.007
Participation Rate (4Q)	06-02-2018	21:45	NZD	-	0.711
Private Wages ex Overtime (QoQ) (4Q)	06-02-2018	21:45	NZD	-	0.007
Unemployment Rate (4Q)	06-02-2018	21:45	NZD	-	0.046
Fed's Bullard Speaks on U.S. Economy and Monetary Policy	06-02-2018	13:50	USD	-	-
JOLTS Job Openings (DEC)	06-02-2018	15:00	USD	-	5879
Trade Balance (DEC)	06-02-2018	13:30	USD	-	-
U.S. to Sell 4-Week Bills	06-02-2018	16:30	USD	-	-
U.S. to Sell USDCB Bills	06-02-2018	18:00	USD	-	-



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