



07 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,555	0.5 %	14.3 %
BSE SENSEX	34,196	(1.6) %	14.9 %
CNX BANK	25,928	0.5 %	20.3 %
CNX MIDCAP	19,650	1.3 %	13.4 %
CNX SMALLCAP	8,279	2.4 %	17.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,913	2.3 %	0.4 %
S&P 500	2,695	1.7 %	(0.0) %
FTSE 100	7,141	(2.6) %	(6.6) %
HANG SENG	30,595	(5.1) %	0.3 %
NIKKEI	21,610	(4.7) %	(8.1) %
SHANGHAI COMPOSITE	3,371	(3.4) %	0.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.25	0.3 %	0.9 %
EUR/USD	1.24	0.2 %	3.2 %
GBP/USD	1.40	0.1 %	3.4 %
USD/JPY	109.44	0.7 %	(2.9) %
USD/AUD	1.27	(0.5) %	(1.0) %
USD/SGD	1.32	(0.4) %	(1.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(1.2) %	5.0 %
Gold(INR/10g)	30,433	0.5 %	3.7 %
Gold Comex(USD/oz)	1,332	(1.1) %	1.8 %
SILVER(INR/1Kg)	38,788	0.2 %	0.5 %
Aluminium(USD/MT)	2,196	(0.3) %	(2.7) %
Copper(USD/MT)	7,060	0.1 %	(1.7) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.1 %	0.3 %

Global Economy: Germany's factory orders rebounded on foreign demand. Factory orders increased 3.8% month-on-month in December, in contrast to a revised 0.1% drop in November, data from Destatis showed Tuesday. This was the fastest growth in four months. China's monetary policy will be stable and neutral this year and comprehensive tools will be applied to maintain liquidity in the banking system and promote reasonable growth in social financing, People's Bank of China said.

Global Equities: DOW recovered yesterday amid highly volatile trades. The index closed firmly higher, adding more than 500 points. On Monday, the DOW has witnessed its biggest one-day drop for the blue-chip average since August 2011.

Indian Economy: Chairperson, CBEC, Vanaja N Sarna emphasized that customs duty enhancement in nearly 45 items of mass consumption in Budget 2018-19 are meant to push 'Make in India' and should not be seen with the perspective of protectionist tendencies. This move is not at all inflationary and that it singularly aims at promoting 'Make in India' in items of huge mass needs as each MSME would want to take part in the phased manufacturing programme of India as per which manufacturing requires to be encouraged in smaller items such as mobile phones and their parts, auto parts, candles, watches and so on so forth, she noted.

Equity Markets: The local stock markets registered sharp losses amid global sell-off. The selling extended recent fall triggered by the introduction of the long-term capital gains (LTCG) tax on equities exceeding Rs 1 lakh at 10% in the Budget 2018 unveiled on 1 February 2018. The Sensex settled above the 34,000 level after falling below that level in intraday trade. The Sensex and the Nifty, both hit their lowest closing levels in more than one month. Key indices opened sharply lower on weak global cues and languished in negative terrain with sharp losses till afternoon trade. Indices trimmed intraday losses in mid-afternoon trade and closed with sharp losses.

Corporate News: Shares from interest rate sensitive auto, banking and realty sectors will be in focus ahead of the Reserve Bank of India's (RBI) monetary policy decision today, 7 February 2018. The Reserve Bank of India's (RBI) two-day Monetary Policy Committee (MPC) meeting concludes later in the day today, 7 February 2018 for the sixth bi-monthly monetary policy statement for 2017-18. The central bank is likely to keep its policy rate on hold, but could toughen its warnings against inflation. Hero MotoCorp's net profit rose 4.3% to Rs 805.43 crore on 14.8% growth in net sales to Rs 7305.49 crore in Q3 December 2017 over Q3 December 2016. Hero MotoCorp's chairman, managing director and chief executive officer, Pawan Munjal, said that the company grew on all key performance parameters including revenue, PAT and earnings before interest, taxes, depreciation and amortization (EBITDA) during the quarter, bucking the severe headwinds on the commodities front. With an enhanced focus on the premium segment and scooters, the company is confident of carrying the growth momentum forward, Munjal added. Aurobindo Pharma, Cipla and Eicher Motors are scheduled to announce October-December 2017 quarterly results today, 7 February 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(169.2)	71.8	16.0
MF(INR cr)	(956.7)	(610.8)	547.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	44,689	46,808	33,399
F&O(INR cr)	944,331	941,793	638,059

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	30.0	24.5	11.1
NSE VIX	20.0	16.4	12.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,811	(1.1) %	19.8 %	Energy	13,584	(1.3) %	14.9 %
IT	12,562	(2.9) %	18.6 %	Pharma	8,871	(2.2) %	(15.5) %
Metals	3,862	(1.6) %	24.4 %	Finance	10,573	(1.1) %	19.8 %
Auto	11,182	(1.8) %	12.7 %	PSU	3,439	(2.1) %	(2.5) %
FMCG	26,673	(1.9) %	12.8 %	Real Estate	313	(1.9) %	43.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oil India	349	3.8 %	5.7 %	Lupin	801	(5.7) %	(44.2) %
Bajaj Fin.	1,662	3.6 %	40.7 %	Tata Motor	375	(5.1) %	(20.2) %
Emami	1,111	1.7 %	5.9 %	Tata Motor	209	(4.7) %	(25.8) %
Havells In	506	1.4 %	7.9 %	HCL Techno	954	(4.0) %	10.1 %
Marico	299	1.3 %	0.9 %	NMDC	128	(3.8) %	(4.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Foreign Reserves (Australian dollar) (JAN)	07-02-2018	5:30	AUD	-	-
Building Permits (MoM) (DEC)	07-02-2018	13:30	CAD	-	(0.077)
Foreign Currency Reserves (JAN)	07-02-2018	8:00	CHF	-	-
UBS Real Estate Bubble Index (4Q)	07-02-2018	7:00	CHF	-	1.38
ECB's Nouy and Lautenschlaeger s Curncy Speak in Frankfurt	07-02-2018	9:00	EUR	-	-
European Commission Economic Forecasts	07-02-2018	10:00	EUR	-	-
German Industrial Production n.s.a. and w.d.a. (YoY) (DEC)	07-02-2018	7:00	EUR	-	0.056
German Industrial Production s.a. (MoM) (DEC)	07-02-2018	7:00	EUR	-	0.034
Halifax House Price 3Mths/Year (JAN)	07-02-2018	8:30	GBP	-	0.027
Halifax House Prices (MoM) (JAN)	07-02-2018	8:30	GBP	-	(0.006)
Adjusted Current Account Total (Yen) (DEC)	07-02-2018	23:50	JPY	-	-
Bank Lending Ex-Trusts (YoY) (JAN)	07-02-2018	23:50	JPY	-	0.024
Bank Lending incl Trusts (YoY) (JAN)	07-02-2018	23:50	JPY	-	0.025
BOJ Outright Bond Purchase 1~3 Years	07-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	07-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	07-02-2018	1:10	JPY	-	-
BoP Current Account Balance (DEC)	07-02-2018	23:50	JPY	-	-
Coincident Index (DEC P)	07-02-2018	5:00	JPY	-	117.9
Foreign Buying Japan Bonds (2 FEB)	07-02-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (2 FEB)	07-02-2018	23:50	JPY	-	-
Housing Loans (YoY) (4Q)	07-02-2018	23:50	JPY	-	0.029
Japan Buying Foreign Bonds (Yen) (2 FEB)	07-02-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (2 FEB)	07-02-2018	23:50	JPY	-	-
Labor Cash Earnings (YoY) (DEC)	07-02-2018	0:00	JPY	-	0.009
Leading Index CI (DEC P)	07-02-2018	5:00	JPY	-	108.3
Real Cash Earnings (YoY) (DEC)	07-02-2018	0:00	JPY	-	0.001
Trade Balance - BOP Basis (Yen) (DEC)	07-02-2018	23:50	JPY	-	-
RBNZ Official Cash Rate (8 FEB)	07-02-2018	20:00	NZD	-	0.0175
RBNZ's Comprehensive Performance and Policy Statement	07-02-2018	21:00	NZD	-	-



Consumer Credit (DEC)	07-02-2018	20:00	USD	-	-
DOE Cushing OK Crude Inventory (2 FEB)	07-02-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (2 FEB)	07-02-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (2 FEB)	07-02-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (2 FEB)	07-02-2018	15:30	USD	-	-
Fed's Dudley Speaks in Moderated Q&A	07-02-2018	13:30	USD	-	-
Fed's Evans Speaks on Economic and Policy Outlook	07-02-2018	15:15	USD	-	-
Fed's Kaplan Speaks in Frankfurt	07-02-2018	11:00	USD	-	-
Fed's Williams Speaks in Hawaii	07-02-2018	22:20	USD	-	-
MBA Mortgage Applications (2 FEB)	07-02-2018	12:00	USD	-	(0.026)
U.S. to Sell USD24 Bln 10-Year Notes	07-02-2018	18:00	USD	-	-

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