



07 Dec.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,044	0.0 %	8.7 %
BSE SENSEX	32,597	(0.6) %	9.0 %
CNX BANK	24,852	0.0 %	15.3 %
CNX MIDCAP	19,552	0.0 %	12.8 %
CNX SMALLCAP	8,451	0.0 %	19.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,141	(0.2) %	21.4 %
S&P 500	2,629	(0.0) %	16.5 %
FTSE 100	7,348	0.3 %	2.4 %
HANG SENG	28,225	(2.1) %	27.4 %
NIKKEI	22,177	(2.0) %	13.2 %
SHANGHAI COMPOSITE	3,294	(0.3) %	5.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.52	0.2 %	(4.3) %
EUR/USD	1.18	(0.6) %	11.3 %
GBP/USD	1.34	(0.7) %	8.8 %
USD/JPY	112.44	(0.0) %	(3.1) %
USD/AUD	1.32	1.2 %	(3.2) %
USD/SGD	1.35	0.2 %	(5.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.3 %	10.1 %
Gold(INR/10g)	28,977	(0.3) %	4.2 %
Gold Comex(USD/oz)	1,268	(0.8) %	9.6 %
SILVER(INR/1Kg)	37,233	(0.9) %	(4.3) %
Aluminium(USD/MT)	2,052	(0.0) %	20.6 %
Copper(USD/MT)	6,645	(2.4) %	19.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	(0.0) %	(0.1) %

Global Economy: Labor productivity in the US recorded a sharp increase in the third quarter, according to a revised report released by the Labor Department on Wednesday. The report said labor productivity jumped by 3% in the third quarter, unchanged from the preliminary estimate. Germany's factory orders increased unexpectedly in October on demand from domestic market and non-euro area economies. New orders in manufacturing surged 0.5% month-on-month in October, but slower than the revised 1.2% rise in September, figures from Destatis revealed. Moody's Investors Service retained the sovereign ratings of Japan on Wednesday. The credit rating was kept unchanged at 'A1' with 'stable' outlook.

Global Equities: US stocks turned in a mixed performance on uncertainty about the economic impact of the Republican tax reform plan. ADP said private sector employment climbed by 190,000 jobs in November after soaring by 235,000 jobs in October. Stocks slipped in Europe and Asia.

Indian Economy: The Monetary Policy Committee of the RBI kept its key interest rate, the repo rate, unchanged at 6%. Consequently, the reverse repo rate under the LAF remains at 5.75%, and the marginal standing facility (MSF) rate and the Bank Rate at 6.25%. The bank last cut rates by 25 bps four months earlier in its August review. RBI noted that Q2 growth was lower than that projected in the October resolution. The recent increase in oil prices may have a negative impact on margins of firms and GVA growth.

Equity Markets: Local indices dropped after the Reserve Bank of India (RBI) left key policy rates unchanged after monetary policy review today. Negative leads from global stocks also spoiled investors sentiment. The Sensex settled at over 6-week low. The Nifty settled at 8-week low. The continued slide on the bourses was led by index heavyweights HDFC, HDFC Bank and ICICI Bank. Shares from interest rate sensitive auto and banking sectors edged lower after the RBI kept policy rates unchanged. Metal and mining stocks edged lower as commodities prices declined in international market as investors raised doubts over China demand for metals.

Corporate News: IDBI Bank said that its board of directors, has approved sale of 28 lakh equity shares of National Securities Depository (NSDL) constituting 7% of its total paid up equity capital held by IDBI Bank. Infosys announced that it has submitted application with the Securities and Exchange Board of India pertaining to matters relating to the severance agreement entered into with the former CFO in October 2015. BEML has opened spare parts and warehouse office yesterday, 6 December 2017 at Pune, Maharashtra. BEML has established its office at Pune not only to enhance its presence in Maharashtra but also to reach the doorsteps of customers i.e., Indian Army. Gayatri Projects announced that its board has approved to raise funds upto an amount of Rs 1000 crore, by issue of securities but not limited to equity shares, and or any other securities convertible into equity shares and/or NCDs with or without warrant, through further public offer/qualified institutional placement/preferential issue/rights issue or through any permissible mode.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(218.0)	(108.7)	9.5
MF(INR cr)	299.6	561.5	598.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	5,971	24,252	31,874
F&O(INR cr)	677,445	503,904	610,589

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.3	11.5	11.0
NSE VIX	15.1	14.9	12.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,852	(1.1) %	15.3 %	Energy	13,965	0.2 %	18.2 %
IT	11,075	0.4 %	4.6 %	Pharma	8,938	(1.2) %	(14.9) %
Metals	3,531	(2.0) %	13.7 %	Finance	10,119	(1.3) %	14.7 %
Auto	11,021	(0.7) %	11.1 %	PSU	3,752	(2.1) %	6.4 %
FMCG	25,622	(0.3) %	8.4 %	Real Estate	315	(0.3) %	43.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Godrej Con	1,004	2.8 %	18.4 %	Bosch	19,150	(3.7) %	(15.4) %
Tech Mahin	472	1.5 %	4.2 %	Hind.Zinc	286	(3.4) %	(2.0) %
Torrent Ph	1,303	1.4 %	(13.4) %	LIC Housin	553	(3.4) %	(11.4) %
Reliance I	927	1.4 %	34.8 %	Hindalco I	232	(3.3) %	19.9 %
Maruti Suz	8,612	1.3 %	41.8 %	Siemens	1,127	(3.0) %	(13.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Foreign Reserves (Australian dollar) (NOV)	07-12-2017	5:30	AUD	-	-
Trade Balance (OCT)	07-12-2017	0:30	AUD	-	-
Building Permits (MoM) (OCT)	07-12-2017	13:30	CAD	-	0.038
Ivey Purchasing Managers Index s.a. (NOV)	07-12-2017	15:00	CAD	-	63.8
Foreign Currency Reserves (NOV)	07-12-2017	8:00	CHF	-	-
Unemployment Rate (NOV)	07-12-2017	6:45	CHF	-	0.03
Unemployment Rate s.a. (NOV)	07-12-2017	6:45	CHF	-	0.031
Draghi holds conference as GHOS chair in Frankfurt	07-12-2017	16:00	EUR	-	-
Euro-Zone Government Expenditure (QoQ) (3Q)	07-12-2017	10:00	EUR	-	0.005
Euro-Zone Gross Domestic Product s.a. (QoQ) (3Q F)	07-12-2017	10:00	EUR	-	0.006
Euro-Zone Gross Domestic Product s.a. (YoY) (3Q F)	07-12-2017	10:00	EUR	-	0.025
Euro-Zone Gross Fixed Capital (QoQ) (3Q)	07-12-2017	10:00	EUR	-	0.009
Euro-Zone Household Consumption (QoQ) (3Q)	07-12-2017	10:00	EUR	-	0.005
German Industrial Production n.s.a. and w.d.a. (YoY) (OCT)	07-12-2017	7:00	EUR	-	0.036
German Industrial Production s.a. (MoM) (OCT)	07-12-2017	7:00	EUR	-	(0.016)
Halifax House Price 3Mths/Year (NOV)	07-12-2017	8:30	GBP	-	0.045
Halifax House Prices (MoM) (NOV)	07-12-2017	8:30	GBP	-	0.003
Adjusted Current Account Total (Yen) (OCT)	07-12-2017	23:50	JPY	-	-
Bank Lending Ex-Trusts (YoY) (NOV)	07-12-2017	23:50	JPY	-	0.028
Bank Lending incl Trusts (YoY) (NOV)	07-12-2017	23:50	JPY	-	0.028
BoP Current Account Balance (OCT)	07-12-2017	23:50	JPY	-	-
Coincident Index (OCT P)	07-12-2017	5:00	JPY	-	116.2
GDP Business Spending (QoQ) (3Q F)	07-12-2017	23:50	JPY	-	0.002
GDP SA (QoQ) (3Q F)	07-12-2017	23:50	JPY	-	0.003
Gross Domestic Product Annualized s.a. (QoQ) (3Q F)	07-12-2017	23:50	JPY	-	0.014
Gross Domestic Product Deflator (YoY) (3Q F)	07-12-2017	23:50	JPY	-	0.001
Gross Domestic Product Private Consumption (QoQ) (3Q F)	07-12-2017	23:50	JPY	-	(0.005)
Leading Index CI (OCT P)	07-12-2017	5:00	JPY	-	106.4
Minimal Gross Domestic Product (QoQ) (3Q F)	07-12-2017	23:50	JPY	-	0.007



Tokyo Avg Office Vacancies (NOV)	07-12-2017	2:00	JPY	-	3.02
Trade Balance - BOP Basis (Yen) (OCT)	07-12-2017	23:50	JPY	-	-
CPI (MoM) (NOV)	07-12-2017	14:00	MXN	-	0.0063
CPI (YoY) (NOV)	07-12-2017	14:00	MXN	-	0.0637
Manufacturing Activity (3Q)	07-12-2017	21:45	NZD	-	0.039
Manufacturing Activity Volume (QoQ) (3Q)	07-12-2017	21:45	NZD	-	0.01
Challenger Job Cuts (YoY) (NOV)	07-12-2017	12:30	USD	-	(0.03)
Consumer Credit (OCT)	07-12-2017	20:00	USD	-	-
Continuing Claims (NOV 25)	07-12-2017	13:30	USD	-	-
EIA Natural Gas Storage Change (DEC 01)	07-12-2017	15:30	USD	-	(33)
EIA Working Natural Gas Implied Flow (DEC 01)	07-12-2017	15:30	USD	-	(33)
Household Change in Net Worth (3Q)	07-12-2017	17:00	USD	-	-
Initial Jobless Claims (DEC 02)	07-12-2017	13:30	USD	-	-

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