



09 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,623	(0.0) %	15.0 %
BSE SENSEX	34,353	0.6 %	15.0 %
CNX BANK	25,658	(0.1) %	19.1 %
CNX MIDCAP	21,733	0.1 %	25.4 %
CNX SMALLCAP	9,505	(0.3) %	34.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,283	(0.1) %	1.8 %
S&P 500	2,748	0.2 %	1.9 %
FTSE 100	7,697	(0.4) %	0.6 %
HANG SENG	30,900	0.3 %	1.3 %
NIKKEI	23,715	0.9 %	0.9 %
SHANGHAI COMPOSITE	3,409	0.5 %	1.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.50	0.2 %	(0.3) %
EUR/USD	1.20	(0.5) %	(0.3) %
GBP/USD	1.36	0.0 %	0.5 %
USD/JPY	112.55	(0.4) %	(0.2) %
USD/AUD	1.27	0.1 %	(0.5) %
USD/SGD	1.33	0.3 %	(0.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	0.5 %	2.3 %
Gold(INR/10g)	29,492	0.2 %	0.5 %
Gold Comex(USD/oz)	1,320	(0.0) %	0.9 %
SILVER(INR/1Kg)	38,714	0.7 %	0.3 %
Aluminium(USD/MT)	2,178	(1.3) %	(3.5) %
Copper(USD/MT)	7,085	(0.2) %	(1.3) %

FIXED INCOME

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

Global Economy: Eurozone economic confidence strengthened further in December, reaching its highest level seen since late 2000. The economic confidence index rose more-than-expected to 116 from 114.6 in November, survey results from the European Commission showed Monday. Eurozone retail sales also rebounded strongly in November. Retail sales grew a calendar and seasonally-adjusted 1.5% from October, when they dropped 1.1%. China's foreign exchange reserves increased for the eleventh straight month in December, data from the People's Bank of China showed Monday. Foreign exchange reserves rose \$20.7 billion to \$3.14 trillion at the end of December. This was the highest since September 2016. During the whole year of 2017, foreign exchange reserves jumped around \$129 billion.

Global Equities: US stocks witnessed a mixed movement after recent surge. A lack of major US economic data also kept traders on the sidelines.

Indian Economy: As many as 24 power projects with 41.81 GW capacity may be under a severe financial stress, but the troubled sector still holds hope in growth drivers including higher demand from the Railways, proposed law to enforce power purchase agreements (PPAs) on the discoms, increasing focus on electric vehicles and reaching electricity to all un-electrified villages, an ASSOCHAM study has noted. Stressed assets remain a key concern for power sector in India. Out of the 24 stressed projects having capacity of 41.81 GW, 8,300 MWs are without any power purchase agreements (PPA), 9500 MW capacity are having partial PPAs (i.e. less than 40%). The balance capacity is having PPAs greater than 40%. Avenues need to be found out to utilize the power available in the stranded capacities, which are already commissioned or nearing completion, the study noted.

Equity Markets: The local stocks registered modest gains on positive global cues, with the barometer index, the S&P BSE Sensex and the Nifty 50 index, hitting record high levels in the intraday as well as on closing basis. Key benchmark indices had opened the session on a strong note with the Sensex and the Nifty hitting record highs in early trade, tracking firmness in Asian markets and strong finish on Wall Street.

Corporate News: Shares of NMDC will be in focus after government's plan to sell stake in the company through an offer for sale at a floor price of Rs 153.50 per share. The President of India, acting through and represented by the Ministry of Steel, Government of India, is the promoter of NMDC (Promoter). The promoter proposes to sell up to 4.74 crore (1.5%) equity shares on 9 January 2018 (for non-retail investors only) and on 10 January 2018 (for retail investors and for non-retail investors who choose to carry forward their un-allotted bids) with an option to additionally sell up to 4.74 crore (1.5%) equity shares of NMDC. Tata Motors will be watched after its foreign unit, Jaguar Land Rover (JLR), reported 0.6% rise in retail sales to 55,697 vehicles in December 2017 over December 2016. Aarti Drugs has fixed 19 January 2018 as record date for buyback of upto 2.75 lakh shares representing upto 1.15% stake at Rs 875 per share.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	140.8	62.3	7.3
MF(INR cr)	1,208.5	416.7	576.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	43,702	39,653	32,425
F&O(INR cr)	394,141	531,774	618,137

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.5	9.4	10.8
NSE VIX	13.7	13.5	12.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,676	0.3 %	19.2 %	Energy	14,326	0.5 %	21.2 %
IT	11,777	1.2 %	11.2 %	Pharma	9,838	1.4 %	(6.3) %
Metals	4,166	0.9 %	34.2 %	Finance	10,520	0.4 %	19.2 %
Auto	11,975	0.4 %	20.7 %	PSU	3,689	(0.2) %	4.6 %
FMCG	27,121	0.8 %	14.7 %	Real Estate	351	0.9 %	60.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Pru	412	4.5 %	6.9 %	Idea Cellu	109	(5.8) %	28.1 %
Coal India	287	3.1 %	(2.6) %	Bharti Air	516	(4.4) %	51.1 %
Cadila Hea	452	2.7 %	2.1 %	Avenue Sup	1,227	(1.3) %	93.4 %
Lupin	923	2.6 %	(35.6) %	NHPC Ltd	33	(1.2) %	2.8 %
Infosys	1,036	2.4 %	2.7 %	Marico	323	(1.2) %	9.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ANZ Job Advertisements (MoM) (DEC)	09-01-2018	0:30	AUD	-	0.015
Building Approvals (MoM) (NOV)	09-01-2018	0:30	AUD	-	0.009
Building Approvals (YoY) (NOV)	09-01-2018	0:30	AUD	-	0.184
Housing Starts (DEC)	09-01-2018	13:15	CAD	-	-
Foreign Currency Reserves (DEC)	09-01-2018	8:00	CHF	-	-
Retail Sales Real (YoY) (NOV)	09-01-2018	8:15	CHF	-	(0.03)
SNB Preliminary Full-Year Results	09-01-2018	6:25	CHF	-	-
Unemployment Rate (DEC)	09-01-2018	6:45	CHF	-	0.031
Unemployment Rate s.a. (DEC)	09-01-2018	6:45	CHF	-	0.03
Euro-Zone Unemployment Rate (NOV)	09-01-2018	10:00	EUR	-	0.088
German Current Account (euros) (NOV)	09-01-2018	7:00	EUR	-	-
German Exports s.a. (MoM) (NOV)	09-01-2018	7:00	EUR	-	(0.004)
German Imports s.a. (MoM) (NOV)	09-01-2018	7:00	EUR	-	0.018
German Industrial Production n.s.a. and w.d.a. (YoY) (NOV)	09-01-2018	7:00	EUR	-	0.027
German Industrial Production s.a. (MoM) (NOV)	09-01-2018	7:00	EUR	-	(0.014)
German Trade Balance (NOV)	09-01-2018	7:00	EUR	-	-
BRC Sales Like-For-Like (YoY) (DEC)	09-01-2018	0:01	GBP	-	0.006
BOJ Outright Bond Purchase 10~25 Years	09-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	09-01-2018	1:10	JPY	-	-
Consumer Confidence Index (DEC)	09-01-2018	5:00	JPY	-	44.9
Labor Cash Earnings (YoY) (NOV)	09-01-2018	0:00	JPY	-	0.006
Real Cash Earnings (YoY) (NOV)	09-01-2018	0:00	JPY	-	0.002
Fed's Kashkari Speaks on Moderated Panel	09-01-2018	15:00	USD	-	-
JOLTS Job Openings (NOV)	09-01-2018	15:00	USD	-	5996
NFIB Small Business Optimism (DEC)	09-01-2018	11:00	USD	-	107.5
U.S. to Sell 4-Week Bills	09-01-2018	16:30	USD	-	-
U.S. to Sell USD24 Bln 3-Year Notes	09-01-2018	18:00	USD	-	-

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