



09 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,577	1.0 %	14.5 %
BSE SENSEX	34,413	1.0 %	15.1 %
CNX BANK	25,921	1.0 %	20.3 %
CNX MIDCAP	19,828	1.8 %	14.4 %
CNX SMALLCAP	8,467	2.4 %	19.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,860	(4.2) %	(3.9) %
S&P 500	2,581	(3.8) %	(4.3) %
FTSE 100	7,171	(1.5) %	(6.2) %
HANG SENG	30,451	0.4 %	(0.2) %
NIKKEI	21,891	1.1 %	(6.9) %
SHANGHAI COMPOSITE	3,262	(1.4) %	(2.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.26	0.0 %	0.9 %
EUR/USD	1.23	(1.0) %	2.1 %
GBP/USD	1.39	(0.2) %	3.2 %
USD/JPY	108.84	(0.6) %	(3.4) %
USD/AUD	1.28	1.5 %	0.5 %
USD/SGD	1.33	1.1 %	(0.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	(2.5) %	2.4 %
Gold(INR/10g)	29,881	(1.0) %	1.8 %
Gold Comex(USD/oz)	1,316	(1.2) %	0.5 %
SILVER(INR/1Kg)	37,709	(1.7) %	(2.3) %
Aluminium(USD/MT)	2,182	(0.7) %	(3.3) %
Copper(USD/MT)	7,006	(0.8) %	(2.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.4 %

Global Economy: China's exports stayed supported on global demand at the start of the year and imports also surged according to data from the General Administration of Customs revealed Thursday. In dollar terms, exports soared 11.1% year-over-year in January following a 10.9% gain in December. Imports also surged 36.9% in January from a year ago. The trade surplus dropped to \$20.34 billion in January. The Bank of England decided to stand steady on interest but raised its near-term growth projections, citing strengthening global growth, and forecast inflation to remain above 2 percent target over the forecast horizon. At the rate-setting meeting, the Monetary Policy Committee unanimously voted to maintain the benchmark rate at 0.50%. The bank had previously raised its key rate in November 2017, which was the first hike in a decade.

Global Equities: US stocks melted yesterday amid overwhelming selling pressure. The Dow shed 1,032 points, or 4.2% and is down more than 10% from all-time highs set late January.

Indian Economy: The Cabinet Committee on Economic Affairs, chaired by the Prime Minister Shri Narendra Modi, has approved to enhance of the target of Pradhan Mantri Ujjwala Yojana (PMUY) from five crore to eight crore with an additional allocation of Rs. 4,800 crore. The decision comes in the wake of huge response to PMUY from the women particularly in rural areas and to cover such households not having LPG connection. The revised target of Pradhan Mantri Ujjwala Yojana (PMUY) will be achieved by 2020.

Equity Markets: Local stocks registered modest gains as bargain hunting emerged on the bourses after seven straight sessions of losses. Key indices opened higher and extended gains in mid-morning trade. Later, indices traded within a narrow range with strong gains till afternoon trade. Indices trimmed some gains in mid-afternoon trade and closed with modest gains with a bit of volatility seen in the last hour of trading.

Corporate News: IT stocks would be in focus today after industry body Nasscom said that the outlook for the Indian information technology (IT) sector is 'cautiously positive' in 2018 as challenges remain amidst prospects of greater IT spending with global and US economies improving. ACC reported that its consolidated net profit jumped 126.37% to Rs 206 crore on 30.17% growth in net sales to Rs 3417 crore in Q4 December 2017 over Q4 December 2016. Bharat Heavy Electricals (Bhel) stated that its net profit surged 63.76% to Rs 153.19 crore on 0.35% growth in total revenue from operations to Rs 6626.35 crore in Q3 December 2017 over Q3 December 2016. Steel Authority of India (Sail) reported net profit of Rs 43.16 crore in Q3 December 2017 as compared to net loss of Rs 794.84 crore in Q3 December 2016. Total income rose 35.85% to Rs 15443.13 crore in Q3 December 2017 over Q3 December 2016. Glenmark Pharmaceuticals' consolidated net profit dropped 78.05% to Rs 104.74 crore on 14.48% fall in total income to Rs 2180.50 crore in Q3 December 2017 over Q3 December 2016.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(156.1)	(41.6)	13.8
MF(INR cr)	472.5	284.5	552.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,441	44,302	33,454
F&O(INR cr)	1,426,958	986,848	642,161

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	27.7	25.2	11.2
NSE VIX	17.8	17.1	12.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,921	1.0 %	20.3 %	Energy	13,727	0.1 %	16.1 %
IT	12,588	1.1 %	18.8 %	Pharma	9,262	3.7 %	(11.8) %
Metals	3,936	1.5 %	26.7 %	Finance	10,657	1.1 %	20.7 %
Auto	11,344	1.2 %	14.3 %	PSU	3,523	2.6 %	(0.1) %
FMCG	26,787	0.2 %	13.3 %	Real Estate	327	2.6 %	49.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun TV Net	1,007	7.9 %	26.6 %	I O C L	386	(4.7) %	1.2 %
Cipla	613	7.6 %	3.4 %	Aurobindo	602	(2.3) %	(11.9) %
ACC	1,693	6.7 %	15.8 %	GlaxoSmith	6,189	(1.5) %	19.4 %
Sun Pharma	584	6.3 %	(15.6) %	Power Grid	193	(1.2) %	(1.5) %
Ambuja Cem	262	5.5 %	10.3 %	NTPC	164	(1.1) %	(0.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (MoM) (DEC)	09-02-2018	0:30	AUD	-	0.021
Investment Lending (DEC)	09-02-2018	0:30	AUD	-	0.015
RBA Quarterly Statement on Monetary Policy	09-02-2018	0:30	AUD	-	-
Value of Loans (MoM) (DEC)	09-02-2018	0:30	AUD	-	0.027
Full Time Employment Change (JAN)	09-02-2018	13:30	CAD	-	23.7
Net Change in Employment (JAN)	09-02-2018	13:30	CAD	-	-
Part Time Employment Change (JAN)	09-02-2018	13:30	CAD	-	54.9
Participation Rate (JAN)	09-02-2018	13:30	CAD	-	65.8
Unemployment Rate (JAN)	09-02-2018	13:30	CAD	-	0.057
Unemployment Rate (JAN)	09-02-2018	6:45	CHF	-	0.033
Unemployment Rate s.a. (JAN)	09-02-2018	6:45	CHF	-	0.03
Consumer Price Index (YoY) (JAN)	09-02-2018	1:30	CNY	-	0.018
Producer Price Index (YoY) (JAN)	09-02-2018	1:30	CNY	-	0.049
BOE's Cunliffe Speaks in California	09-02-2018	16:45	GBP	-	-
Construction Output SA (MoM) (DEC)	09-02-2018	9:30	GBP	-	0.004
Construction Output SA (YoY) (DEC)	09-02-2018	9:30	GBP	-	0.004
Industrial Production (MoM) (DEC)	09-02-2018	9:30	GBP	-	0.004
Industrial Production (YoY) (DEC)	09-02-2018	9:30	GBP	-	0.025
Manufacturing Production (MoM) (DEC)	09-02-2018	9:30	GBP	-	0.004
Manufacturing Production (YoY) (DEC)	09-02-2018	9:30	GBP	-	0.035
NIESR Gross Domestic Product Estimate (JAN)	09-02-2018	12:00	GBP	-	0.006
Trade Balance (DEC)	09-02-2018	9:30	GBP	-	-
Trade Balance Non EU GBP/Mn (DEC)	09-02-2018	9:30	GBP	-	-
Visible Trade Balance (Pounds) (DEC)	09-02-2018	9:30	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	09-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	09-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	09-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	09-02-2018	1:10	JPY	-	-
Tertiary Industrial Production (MoM) (DEC)	09-02-2018	4:30	INR	-	0.011



Baker Hughes U.S. Rig Count (9 FEB)	09-02-2018	18:00	USD	-	946
Fed's George Speaks on the Economy	09-02-2018	2:00	USD	-	-
Wholesale Inventories (MoM) (DEC F)	09-02-2018	15:00	USD	-	0.002
Wholesale Trade Sales (MoM) (DEC)	09-02-2018	15:00	USD	-	0.015

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