



10 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,639	0.0 %	15.2 %
BSE SENSEX	34,443	0.3 %	15.2 %
CNX BANK	25,660	(0.2) %	19.1 %
CNX MIDCAP	21,750	0.3 %	25.5 %
CNX SMALLCAP	9,576	0.5 %	35.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,386	0.4 %	2.3 %
S&P 500	2,751	0.1 %	2.1 %
FTSE 100	7,731	0.5 %	1.1 %
HANG SENG	31,011	0.4 %	1.6 %
NIKKEI	23,850	0.6 %	1.5 %
SHANGHAI COMPOSITE	3,414	0.1 %	2.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.72	0.3 %	0.1 %
EUR/USD	1.19	(0.2) %	(0.5) %
GBP/USD	1.35	(0.3) %	0.2 %
USD/JPY	112.28	(0.2) %	(0.4) %
USD/AUD	1.28	0.4 %	(0.1) %
USD/SGD	1.34	0.4 %	0.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	2.0 %	4.3 %
Gold(INR/10g)	29,492	0.2 %	0.5 %
Gold Comex(USD/oz)	1,312	(0.6) %	0.3 %
SILVER(INR/1Kg)	38,545	(0.4) %	(0.2) %
Aluminium(USD/MT)	2,144	(1.6) %	(5.0) %
Copper(USD/MT)	7,092	0.1 %	(1.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	0.1 %	0.1 %

Global Economy: Eurozone unemployment rate declined to the lowest since 2009 as robust activity created more jobs in the 19-nation currency bloc. The jobless rate dropped to 8.7% in November, from 8.8% in October, figures from Eurostat showed Tuesday. Germany's industrial production expanded 3.4% month-on-month in November, reversing a revised 1.2% drop in October, figures from Destatis revealed. Industrial output was expected to grow 1.8%. Excluding energy and construction, industrial output gained 4.3% in November. Energy production fell 3.1%, while construction output grew 1.5%.

Global Equities: US stocks moved higher yesterday. With the upward move on the day, the major averages once again climbed to new record closing highs. European markets also edged up impressively.

Indian Economy: The provisional figures of Direct Tax collections up to December, 2017 show that net collections are at Rs. 6.56 lakh crore which is 18.2% higher than the net collections for the corresponding period of last year. The net Direct Tax collections represent 67% of the total Budget Estimates of Direct Taxes for Financial Year (F.Y.) 2017-18 (Rs. 9.8 lakh crore). Gross collections (before adjusting for refunds) have increased by 12.6% to Rs. 7.68 lakh crore during April to December, 2017. Refunds amounting to Rs.1.12 lakh crore have been issued during April to December, 2017. An amount of Rs. 3.18 lakh crore has been received as Advance Tax up to December, 2017 reflecting a growth of 12.7% over the Advance Tax payments of the corresponding period of last year.

Equity Markets: The key benchmark indices registered small gains in a range bound session of trade. The Sensex and the Nifty, both, hit record high in intraday as well as on closing basis. Continuous foreign fund inflows and bets by investors amid optimism over Q3 FY 2018 earnings and upcoming budget helped the key indices to hit record highs.

Corporate News: Motherson Sumi Systems (MSSL) said that its subsidiary has formed a joint venture (JV) with Ossia Inc. According to the company, its subsidiary Samvardhana Motherson Automotive Systems Group B.V. (SMRP BV) will hold majority share in the joint venture. Globally, the JV will focus on the integration of Cota technology into a wide range of non-military passenger, commercial and public transportation vehicles. Power Grid Corporation of India announced that its board approved investment for transmission system for ultra mega solar power park at Tumkur (Pavagada), Karnataka - Phase-II Part-C at an estimated cost of Rs 92.13 crore with commissioning schedule of 20 months from the date of investment approval. Infosys announced the successful conclusion of an Advance Pricing Agreement (APA) with the U.S. Internal Revenue Service (IRS). The preliminary discussions with the IRS on the APA were initiated by the Company in 2015, followed by multiple rounds of discussions. Under the APA, the company and the IRS have agreed on the methodology to allocate revenues and compute the taxable income of the company's US operations. This agreement covers financial years from 2011 to 2021. COMEX Copper edged up as a recovery from two week lows extended amid supportive cues from equities and good bargain buying. The red metal is witnessing decent speculative buying despite elevated prices as tight demand-supply balance is turning out to be a key factor.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	94.5	67.7	7.7
MF(INR cr)	533.0	(97.2)	559.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	42,539	40,065	32,478
F&O(INR cr)	467,899	522,649	617,358

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.1	9.5	10.8
NSE VIX	13.9	13.5	12.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,704	0.1 %	19.3 %	Energy	14,411	0.6 %	21.9 %
IT	11,791	0.1 %	11.3 %	Pharma	9,770	(0.7) %	(7.0) %
Metals	4,167	0.0 %	34.2 %	Finance	10,500	(0.2) %	19.0 %
Auto	11,942	(0.3) %	20.4 %	PSU	3,679	(0.3) %	4.3 %
FMCG	27,249	0.5 %	15.3 %	Real Estate	360	2.8 %	64.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Coal India	304	5.8 %	3.1 %	NMDC	155	(4.4) %	15.7 %
DLF	270	3.7 %	83.8 %	Cummins In	934	(2.4) %	(2.8) %
Yes Bank	341	2.3 %	10.9 %	Zee Entert	580	(2.3) %	9.7 %
Wipro	317	1.9 %	25.1 %	Eicher Mot	28,597	(2.1) %	12.0 %
ITC	271	1.9 %	(3.9) %	United Spi	3,845	(2.0) %	87.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Job vacancies (NOV)	10-01-2018	0:30	AUD	-	0.06
Building Permits (MoM) (NOV)	10-01-2018	13:30	CAD	-	0.035
Consumer Price Index (YoY) (DEC)	10-01-2018	1:30	CNY	-	0.017
Producer Price Index (YoY) (DEC)	10-01-2018	1:30	CNY	-	0.058
Construction Output SA (MoM) (NOV)	10-01-2018	9:30	GBP	-	(0.017)
Construction Output SA (YoY) (NOV)	10-01-2018	9:30	GBP	-	(0.002)
Industrial Production (MoM) (NOV)	10-01-2018	9:30	GBP	-	0
Industrial Production (YoY) (NOV)	10-01-2018	9:30	GBP	-	0.036
Manufacturing Production (MoM) (NOV)	10-01-2018	9:30	GBP	-	0.001
Manufacturing Production (YoY) (NOV)	10-01-2018	9:30	GBP	-	0.039
NIESR Gross Domestic Product Estimate (DEC)	10-01-2018	13:00	GBP	-	0.005
Trade Balance (NOV)	10-01-2018	9:30	GBP	-	-
Trade Balance Non EU GBP/Mn (NOV)	10-01-2018	9:30	GBP	-	-
Visible Trade Balance (Pounds) (NOV)	10-01-2018	9:30	GBP	-	-
Official Reserve Assets (DEC)	10-01-2018	23:50	JPY	-	-
ANZ Job Advertisements (MoM) (DEC)	10-01-2018	21:00	NZD	-	(0.001)
QV House Prices (YoY) (DEC)	10-01-2018	16:00	NZD	-	0.064
DOE Cushing OK Crude Inventory (JAN 05)	10-01-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 05)	10-01-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (JAN 05)	10-01-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (JAN 05)	10-01-2018	15:30	USD	-	-
Export Price Index (MoM) (DEC)	10-01-2018	13:30	USD	-	0.005
Export Price Index (YoY) (DEC)	10-01-2018	13:30	USD	-	0.031
Fed's Bullard Speaks on U.S. Economic Outlook in St. Louis	10-01-2018	18:30	USD	-	-
Fed's Evans Discusses Economy and Policy Outlook	10-01-2018	14:00	USD	-	-
Import Price Index (MoM) (DEC)	10-01-2018	13:30	USD	-	0.007
Import Price Index (YoY) (DEC)	10-01-2018	13:30	USD	-	0.031
Import Price Index ex Petroleum (MoM) (DEC)	10-01-2018	13:30	USD	-	0.001
IMR Monthly Applications (JAN 05)	10-01-2018	12:00	USD	-	0.007



U.S. to Sell USD20 Bln 10-Year Notes Reopening	10-01-2018	18:00	USD	-	-
Wholesale Inventories (MoM) (NOV F)	10-01-2018	15:00	USD	-	0.007
Wholesale Trade Sales (MoM) (NOV)	10-01-2018	15:00	USD	-	0.007

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