



11 Jan.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,632	(0.0) %	15.1 %
BSE SENSEX	34,433	(0.0) %	15.1 %
CNX BANK	25,617	(0.3) %	18.9 %
CNX MIDCAP	21,662	(0.1) %	25.0 %
CNX SMALLCAP	9,530	0.0 %	34.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,369	(0.1) %	2.2 %
S&P 500	2,748	(0.1) %	1.9 %
FTSE 100	7,731	0.5 %	1.1 %
HANG SENG	31,074	0.2 %	1.8 %
NIKKEI	23,788	(0.3) %	1.2 %
SHANGHAI COMPOSITE	3,422	0.2 %	2.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	63.60	0.2 %	(0.1) %
EUR/USD	1.20	(0.1) %	(0.4) %
GBP/USD	1.35	(0.5) %	(0.0) %
USD/JPY	111.55	(0.9) %	(1.0) %
USD/AUD	1.27	(0.2) %	(0.7) %
USD/SGD	1.33	0.2 %	(0.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	2.1 %	4.4 %
Gold(INR/10g)	29,563	0.2 %	0.7 %
Gold Comex(USD/oz)	1,312	(0.6) %	0.3 %
SILVER(INR/1Kg)	38,730	0.5 %	0.3 %
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:** The World Bank forecasts global economic growth to edge up to 3.1% in 2018 after a much stronger-than-expected 2017, as the recovery in investment, manufacturing, and trade continues, and as commodity-exporting developing economies benefit from firming commodity prices. However, this is largely seen as a short-term upswing. Over the longer term, slowing potential growth—a measure of how fast an economy can expand when labor and capital are fully employed—puts at risk gains in improving living standards and reducing poverty around the world, the World Bank warns in its January 2018 Global Economic Prospects. China consumer prices were up 1.8% on year in December, the National Bureau of Statistics said on Wednesday, up from 1.7% in November. On a monthly basis, inflation gained 0.3% following the flat reading a month earlier. UK industrial production growth doubled in November, figures from the Office for National Statistics showed. Industrial output climbed 0.4% month-on-month, faster than the 0.2% increase seen in October. Manufacturing grew 0.4%. On a yearly basis, growth in industrial output slowed to 2.5% from 4.3% in October.

**Global Equities:** European stocks turned lower as investors watch out for corporate earnings and fresh data. Asian stocks were mixed as investors booked profits in shares while oil prices hit three-year highs on continued upbeat momentum.

**Indian Economy:** FDI policy has been further liberalized in key sectors. The government has allowed 100% FDI under automatic route for Single Brand Retail Trading and 100% FDI under automatic route in Construction Development. Foreign airlines have been allowed to invest up to 49% under approval route in Air India. FIIs/FPIs have been allowed to invest in Power Exchanges through primary market. Measures undertaken by the Government have resulted in increased FDI inflows in to the country. The government noted that during the year 2014-15, total FDI inflows received were US \$ 45.15 billion as against US \$ 36.05 billion in 2013-14. During 2015-16, country received total FDI of US \$ 55.46 billion. In the financial year 2016-17, total FDI of US \$ 60.08 billion has been received, which is an all-time high.

**Equity Markets:** Local stocks ended a lackluster trading session on a flat note yesterday. The Sensex had hit a record high in early trade. Later, the movement of key indices was confined to a narrow range around the flat line till mid-morning trade before extending losses amid weakness in Asian stocks. Key indices pared losses and hovered in narrow range in negative terrain in afternoon trade. Indices trimmed intraday losses in mid-afternoon trade and closed the session near the flat line.

**Corporate News:** Moody's Investors Service stated that the gap between the capital profiles of Indian public and private sector banks is expected to narrow following the government's announced INR2.1 trillion (\$32 billion) recapitalization plan for the public sector banks, which are financially the weaker entities. Moreover, Moody's Indian affiliate ICRA says the deterioration in asset quality -- in terms of gross non-performing assets (GNPAs) -- may peak by FY2018, but elevated levels of provisioning on these NPAs will continue to negatively affect the banks during FY2018 and FY2019.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(3.4)	57.5	7.7
MF(INR cr)	250,560.6	41,679.1	1,861.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	8,668	36,140	32,354
F&O(INR cr)	596,072	531,827	617,249

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.1	9.5	10.8
NSE VIX	14.0	13.6	12.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,617	(0.3) %	18.9 %	Energy	14,396	(0.1) %	21.8 %
IT	12,055	2.2 %	13.8 %	Pharma	9,749	(0.2) %	(7.2) %
Metals	4,170	0.1 %	34.3 %	Finance	10,465	(0.3) %	18.6 %
Auto	11,857	(0.7) %	19.5 %	PSU	3,628	(1.4) %	2.9 %
FMCG	27,211	(0.1) %	15.1 %	Real Estate	365	1.3 %	66.6 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Container	1,476	7.3 %	46.0 %	Punjab Nat	171	(2.3) %	13.8 %
TCS	2,807	3.6 %	16.4 %	Ashok Leyl	128	(2.0) %	52.1 %
GlaxoSmith	6,521	3.5 %	25.8 %	Eicher Mot	28,098	(1.7) %	10.0 %
Wipro	327	3.0 %	28.9 %	Titan Comp	918	(1.6) %	99.8 %
Glenmark P	617	2.8 %	(28.0) %	NTPC	174	(1.6) %	5.6 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (NOV)	11-01-2018	0:30	AUD	-	0.005
New Housing Price Index (MoM) (NOV)	11-01-2018	13:30	CAD	-	0.001
New Housing Price Index (YoY) (NOV)	11-01-2018	13:30	CAD	-	0.035
ECB account of the monetary policy meeting	11-01-2018	12:30	EUR	-	-
Euro-Zone Industrial Production s.a. (MoM) (NOV)	11-01-2018	10:00	EUR	-	0.002
Euro-Zone Industrial Production w.d.a. (YoY) (NOV)	11-01-2018	10:00	EUR	-	0.037
German Gross Domestic Product NSA (YoY) (2017)	11-01-2018	9:00	EUR	-	0.019
German Public Finances Balance-GDP Ratio (2017)	11-01-2018	9:00	EUR	-	0.006
Bank of England Credit Conditions & Bank Liabilities Surveys	11-01-2018	9:30	GBP	-	-
Adjusted Current Account Total (Yen) (NOV)	11-01-2018	23:50	JPY	-	-
Bank Lending Ex-Trusts (YoY) (DEC)	11-01-2018	23:50	JPY	-	0.027
Bank Lending incl Trusts (YoY) (DEC)	11-01-2018	23:50	JPY	-	0.027
BOJ Outright Bond Purchase 1~3 Years	11-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	11-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	11-01-2018	1:10	JPY	-	-
BoP Current Account Balance (NOV)	11-01-2018	23:50	JPY	-	-
Coincident Index (NOV P)	11-01-2018	5:00	JPY	-	116.4
Foreign Buying Japan Bonds (JAN 05)	11-01-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JAN 05)	11-01-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JAN 05)	11-01-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JAN 05)	11-01-2018	23:50	JPY	-	-
Leading Index CI (NOV P)	11-01-2018	5:00	JPY	-	106.5
Trade Balance - BOP Basis (Yen) (NOV)	11-01-2018	23:50	JPY	-	-
Building Permits (MoM) (NOV)	11-01-2018	21:45	NZD	-	(0.096)
Continuing Claims (DEC 30)	11-01-2018	13:30	USD	-	-
EIA Natural Gas Storage Change (JAN 05)	11-01-2018	15:30	USD	-	(206)
EIA Working Natural Gas Implied Flow (JAN 05)	11-01-2018	15:30	USD	-	(206)
Fed's Dudley Speaks on the U.S. Economic Outlook	11-01-2018	20:30	USD	-	-
Initial Jobless Claims (JAN 05)	11-01-2018	13:30	USD	-	-



Monthly Budget Statement (DEC)	11-01-2018	19:00	USD	-	-
PPI Ex Food, Energy, Trade (MoM) (DEC)	11-01-2018	13:30	USD	-	0.004
PPI Ex Food, Energy, Trade (YoY) (DEC)	11-01-2018	13:30	USD	-	0.024
PPI Final Demand (YoY) (DEC)	11-01-2018	13:30	USD	-	0.031
Producer Price Index Ex Food and Energy (MoM) (DEC)	11-01-2018	13:30	USD	-	0.003
Producer Price Index Ex Food and Energy (YoY) (DEC)	11-01-2018	13:30	USD	-	0.024
Producer Price Index Final Demand (MoM) (DEC)	11-01-2018	13:30	USD	-	0.004
Revisions: Philadelphia Fed Manufacturing Index	11-01-2018	13:30	USD	-	-
U.S. to Sell USD12 Bln 30-Year Bonds Reopening	11-01-2018	18:00	USD	-	-

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