



12 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,651	0.2 %	15.3 %
BSE SENSEX	34,503	0.2 %	15.4 %
CNX BANK	25,661	0.2 %	19.1 %
CNX MIDCAP	21,719	0.3 %	25.3 %
CNX SMALLCAP	9,566	0.4 %	35.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,575	0.8 %	3.0 %
S&P 500	2,768	0.7 %	2.7 %
FTSE 100	7,763	0.2 %	1.5 %
HANG SENG	31,120	0.2 %	2.0 %
NIKKEI	23,710	(0.3) %	0.9 %
SHANGHAI COMPOSITE	3,425	0.1 %	2.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.66	(0.1) %	(0.0) %
EUR/USD	1.20	0.8 %	0.3 %
GBP/USD	1.35	0.1 %	0.2 %
USD/JPY	111.32	(0.9) %	(1.2) %
USD/AUD	1.27	(0.8) %	(0.8) %
USD/SGD	1.33	(0.5) %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	0.9 %	5.3 %
Gold(INR/10g)	29,606	0.1 %	0.8 %
Gold Comex(USD/oz)	1,320	0.6 %	0.8 %
SILVER(INR/1Kg)	38,514	(0.6) %	(0.2) %
Aluminium(USD/MT)	2,159	0.7 %	(4.3) %
Copper(USD/MT)	7,141	0.7 %	(0.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	0.0 %	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)	(61.4)	42.7	7.3
MF(INR cr)	725.3	182.1	560.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,560	36,631	32,397
F&O(INR cr)	1,020,260	586,097	619,315

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.8	9.5	10.8
NSE VIX	14.0	13.6	12.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,661	0.2 %	19.1 %	Energy	14,341	(0.4) %	21.3 %
IT	12,103	0.4 %	14.3 %	Pharma	9,773	0.2 %	(7.0) %
Metals	4,164	(0.1) %	34.1 %	Finance	10,486	0.2 %	18.8 %
Auto	11,872	0.1 %	19.7 %	PSU	3,641	0.3 %	3.3 %
FMCG	27,308	0.4 %	15.5 %	Real Estate	372	2.0 %	69.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Power Fin.	128	2.4 %	(13.4) %	Container	1,426	(3.4) %	41.0 %
Infosys	1,076	2.2 %	6.6 %	Emami	1,304	(2.4) %	24.3 %
Sun TV Net	1,044	2.1 %	31.2 %	IndusInd B	1,700	(1.9) %	21.2 %
Indiabulls	1,229	2.0 %	23.4 %	Wipro	321	(1.7) %	26.6 %
Motherson	386	1.9 %	54.1 %	Marico	316	(1.7) %	6.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Credit Card Balances (NOV)	12-01-2018	0:30	AUD	-	-
Credit Card Purchases (NOV)	12-01-2018	0:30	AUD	-	-
Teranet/National Bank HP Index (DEC)	12-01-2018	13:30	CAD	-	217.1
Teranet/National Bank HPI (MoM) (DEC)	12-01-2018	13:30	CAD	-	(0.005)
Teranet/National Bank HPI (YoY) (DEC)	12-01-2018	13:30	CAD	-	0.092
Baker Hughes U.S. Rig Count (JAN 12)	12-01-2018	18:00	USD	-	924
Business Inventories (NOV)	12-01-2018	15:00	USD	-	(0.001)
Consumer Price Index (MoM) (DEC)	12-01-2018	13:30	USD	-	0.004
Consumer Price Index (YoY) (DEC)	12-01-2018	13:30	USD	-	0.022
Consumer Price Index Core Index s.a. (DEC)	12-01-2018	13:30	USD	-	253.724
Consumer Price Index Ex Food and Energy (MoM) (DEC)	12-01-2018	13:30	USD	-	0.001
Consumer Price Index Ex Food and Energy (YoY) (DEC)	12-01-2018	13:30	USD	-	0.017
Consumer Price Index n.s.a. (DEC)	12-01-2018	13:30	USD	-	246.669
Fed's Rosengren Gives Keynote Address at UC San Diego Conf	12-01-2018	21:15	USD	-	-
Real Avg Hourly Earning (YoY) (DEC)	12-01-2018	13:30	USD	-	0.002
Real Avg Weekly Earnings (YoY) (DEC)	12-01-2018	13:30	USD	-	0.008
Retail Sales Advance (MoM) (DEC)	12-01-2018	13:30	USD	-	0.008
Retail Sales Control Group (DEC)	12-01-2018	13:30	USD	-	0.008
Retail Sales Ex Auto (MoM) (DEC)	12-01-2018	13:30	USD	-	0.01
Retail Sales Ex Auto and Gas (DEC)	12-01-2018	13:30	USD	-	0.008

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