



12 Dec.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,322	0.6 %	11.7 %
BSE SENSEX	33,456	0.6 %	11.9 %
CNX BANK	25,405	0.3 %	17.9 %
CNX MIDCAP	20,121	0.5 %	16.1 %
CNX SMALLCAP	8,672	0.4 %	22.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,386	0.2 %	22.7 %
S&P 500	2,660	0.3 %	17.8 %
FTSE 100	7,453	0.8 %	3.8 %
HANG SENG	28,965	1.1 %	30.8 %
NIKKEI	22,939	0.6 %	17.1 %
SHANGHAI COMPOSITE	3,322	1.0 %	5.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.37	(0.3) %	(4.5) %
EUR/USD	1.18	(0.0) %	11.0 %
GBP/USD	1.33	(1.0) %	8.5 %
USD/JPY	113.45	0.1 %	(2.2) %
USD/AUD	1.33	(0.3) %	(3.0) %
USD/SGD	1.35	(0.0) %	(5.5) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.2 %	9.6 %
Gold(INR/10g)	28,535	0.2 %	2.6 %
Gold Comex(USD/oz)	1,250	(0.1) %	8.0 %
SILVER(INR/1Kg)	37,158	1.9 %	(4.5) %
Aluminium(USD/MT)	1,992	(0.1) %	17.0 %
Copper(USD/MT)	6,539	0.1 %	17.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	0.0 %	(0.1) %

**Global Economy:** China's bank lending increased in November despite measures taken by the government to curb credit growth, the People's Bank of China showed Monday. New yuan loans totaled CNY 1.12 trillion, much bigger than the expected level of CNY 800 billion and October's CNY 663.2 billion. The broad monetary aggregate M2 growth soared to 9.1% from a record low 8.8 percent posted in October. The total social financing, a broad measure of credit and liquidity, climbed to CNY 1.6 trillion from CNY 1.04 trillion a month ago. Japan's business survey index of large manufacturers strengthened again in the fourth quarter, the quarterly survey by the Ministry of Finance and the Cabinet Office showed Monday. The Business Survey Index, or BSI, for large manufacturers rose to 9.7 in the December quarter from 9.4 in the September. China's consumer inflation slowed more than expected in November and factory prices decelerated sharply, official data showed Saturday. The consumer price index (CPI) – a main gauge of inflation – rose by 1.7% in November from a year ago, compared to a 1.9% increase the previous month and 1.6% in September.

**Global Equities:** European stocks advanced ahead of upcoming European Central Bank (ECB) and US Federal Reserve meetings later this week. Asian stocks also edged higher following strong finish on the Wall Street on Friday. Nikkei topped a fresh 25 year high.

**Indian Economy:** Private equity and venture capital (PE/VC) investments touched USD 2.9 billion across 56 deals in November, driven by big ticket transactions and the momentum is likely to continue further, says an EY report. According to the report, PE/VC investments touched \$0.9 billion across 41 deals in November 2016. Month-on-month, there was a spurt of 40% in value while number of deals remained the same, according to media reports.

**Equity Markets:** Local indices settled with modest gains after a range-bound session of trade on supportive global cues. Both the Sensex, and the Nifty, hovered in positive terrain throughout the trading session. IT stocks advanced. Strong gains in Coal India and index heavyweights HDFC and ITC helped key indices to close the session with gains. The Sensex and the Nifty, both, attained their highest closing level in 2-1/2 weeks.

**Corporate News:** The Union Finance Minister Arun Jaitley held his 5th Pre-Budget Consultation Meeting with the leading Economists. A number of suggestions were given by the participating experts. It was suggested that without compromising on macro-economic stability, more incentives be given on infrastructure investment as well as to SME and Construction Sectors to make them economically viable, give farmers more remunerative prices for their produce keeping in view the target of maintain inflation between 4-6%. Another suggestion was to give more thrust on disinvestment of Public Sector Units (PSUs) as it will provide extra revenue for bridging the fiscal gap and meeting the expenditure needs. A suggestion was made to lower the Corporate Tax up to 20% by removing all exemptions in order to make it competitive at international level. India real estate sector will see inflow of investments from Pension and Insurance funds and other institutional investments owing to dwindling interest rates coupled with sectoral reforms such as implementation of Real Estate (Regulation and Development) Act (RERA), in future, said Anshuman Magazine, chairman CBRE India and Southeast Asia.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	6.8	(106.8)	7.5
MF(INR cr)	299.6	561.5	598.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,106	27,811	31,885
F&O(INR cr)	333,056	554,738	610,796

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.6	10.9	10.9
NSE VIX	14.2	14.6	12.1

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,405	0.3 %	17.9 %	Energy	14,135	(0.3) %	19.6 %
IT	11,324	1.3 %	6.9 %	Pharma	9,186	1.0 %	(12.5) %
Metals	3,650	0.2 %	17.5 %	Finance	10,395	0.6 %	17.8 %
Auto	11,425	0.6 %	15.2 %	PSU	3,809	1.1 %	8.0 %
FMCG	26,710	0.9 %	13.0 %	Real Estate	323	(0.2) %	47.4 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	691	2.7 %	1.2 %	Bharti Inf	368	(1.5) %	11.7 %
NHPC Ltd	29	2.5 %	(10.1) %	ICICI Pru	373	(1.4) %	(3.2) %
UPL	746	2.4 %	1.4 %	P & G Hygi	9,593	(1.3) %	29.9 %
Oracle Fin	3,868	2.3 %	2.2 %	Rural Elec	151	(1.2) %	(15.9) %
A B B	1,374	2.3 %	4.0 %	NTPC	178	(1.1) %	8.3 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Credit Card Balances (OCT)	12-12-2017	0:30	AUD	-	-
Credit Card Purchases (OCT)	12-12-2017	0:30	AUD	-	-
House Price Index (QoQ) (3Q)	12-12-2017	0:30	AUD	-	0.019
House Price Index (YoY) (3Q)	12-12-2017	0:30	AUD	-	0.102
NAB Business Conditions (NOV)	12-12-2017	0:30	AUD	-	21
NAB Business Confidence (NOV)	12-12-2017	0:30	AUD	-	8
RBA Governor Lowe Gives Speech in Sydney	12-12-2017	22:15	AUD	-	-
Westpac Consumer Conf Index (DEC)	12-12-2017	23:30	AUD	-	99.7
Westpac Consumer Confidence (DEC)	12-12-2017	23:30	AUD	-	(0.017)
Manpower Survey (1Q)	12-12-2017	0:01	CNY	-	0.09
Euro-Zone ZEW Survey (Economic Sentiment) (DEC)	12-12-2017	10:00	EUR	-	30.9
German ZEW Survey Current Situation (DEC)	12-12-2017	10:00	EUR	-	88.8
German ZEW Survey Expectations (DEC)	12-12-2017	10:00	EUR	-	18.7
Germany First Quarter Manpower Employment Outlook	12-12-2017	0:01	EUR	-	-
Consumer Price Index (MoM) (NOV)	12-12-2017	9:30	GBP	-	0.001
Consumer Price Index (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.03
Core Consumer Price Index (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.027
CPIH (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.028
House Price Index (YoY) (OCT)	12-12-2017	9:30	GBP	-	0.054
Producer Price Index Input n.s.a. (MoM) (NOV)	12-12-2017	9:30	GBP	-	0.01
Producer Price Index Input n.s.a. (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.046
Producer Price Index Output Core n.s.a. (MoM) (NOV)	12-12-2017	9:30	GBP	-	0.001
Producer Price Index Output Core n.s.a. (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.021
Producer Price Index Output n.s.a. (MoM) (NOV)	12-12-2017	9:30	GBP	-	0.002
Producer Price Index Output n.s.a. (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.028
Retail Price Index (MoM) (NOV)	12-12-2017	9:30	GBP	-	0.001
Retail Price Index (NOV)	12-12-2017	9:30	GBP	-	275.3
Retail Price Index (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.04
Retail Price Index Excl. Food & Alcohol (YoY) (NOV)	12-12-2017	9:30	GBP	-	0.042



Japan Manpower Survey (1Q)	12-12-2017	0:01	JPY	-	23
Machine Orders (MoM) (OCT)	12-12-2017	23:50	JPY	-	(0.081)
Machine Orders (YoY) (OCT)	12-12-2017	23:50	JPY	-	(0.035)
Tertiary Industry Index (MoM) (OCT)	12-12-2017	4:30	JPY	-	(0.002)
Food Prices (MoM) (NOV)	12-12-2017	21:45	NZD	-	(0.011)
Monthly Budget Statement (NOV)	12-12-2017	19:00	USD	-	-
NFIB Small Business Optimism (NOV)	12-12-2017	11:00	USD	-	103.8
PPI Ex Food, Energy, Trade (MoM) (NOV)	12-12-2017	13:30	USD	-	0.002
PPI Ex Food, Energy, Trade (YoY) (NOV)	12-12-2017	13:30	USD	-	0.023
PPI Final Demand (YoY) (NOV)	12-12-2017	13:30	USD	-	0.028
Producer Price Index Ex Food and Energy (MoM) (NOV)	12-12-2017	13:30	USD	-	0.004
Producer Price Index Ex Food and Energy (YoY) (NOV)	12-12-2017	13:30	USD	-	0.024
Producer Price Index Final Demand (MoM) (NOV)	12-12-2017	13:30	USD	-	0.004
U.S. to Sell 4-Week Bills	12-12-2017	16:30	USD	-	-
U.S. to Sell USD12 Bln 30-Year Bonds Reopening	12-12-2017	18:00	USD	-	-

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