



13 Dec.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,240	(0.8) %	10.8 %
BSE SENSEX	33,228	(0.7) %	11.1 %
CNX BANK	25,125	(1.1) %	16.6 %
CNX MIDCAP	19,947	(0.9) %	15.1 %
CNX SMALLCAP	8,593	(0.9) %	21.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,505	0.5 %	23.3 %
S&P 500	2,664	0.2 %	18.0 %
FTSE 100	7,500	0.6 %	4.5 %
HANG SENG	28,794	(0.6) %	30.0 %
NIKKEI	22,866	(0.3) %	16.7 %
SHANGHAI COMPOSITE	3,281	(1.3) %	4.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.40	(0.1) %	(4.5) %
EUR/USD	1.17	(0.2) %	10.8 %
GBP/USD	1.33	(0.5) %	8.3 %
USD/JPY	113.46	(0.0) %	(2.2) %
USD/AUD	1.32	(0.8) %	(3.5) %
USD/SGD	1.35	(0.1) %	(5.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	1.1 %	10.8 %
Gold(INR/10g)	28,443	(0.3) %	2.3 %
Gold Comex(USD/oz)	1,246	(0.3) %	7.7 %
SILVER(INR/1Kg)	36,457	(1.9) %	(6.3) %
Aluminium(USD/MT)	1,992	(0.0) %	17.0 %
Copper(USD/MT)	6,548	0.1 %	17.5 %

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: Germany's ZEW Indicator of Economic Sentiment fell 1.3 points to 17.4 in December, survey data from the Mannheim-based think tank ZEW showed Tuesday. The indicator remained below its long-term average of 23.7 and the expected level of 17.6. Meanwhile, the assessment of the current economic situation rose 0.5 points to 89.3 points. The score was forecast to drop marginally to 88.7. Japan's tertiary activity index climbed 0.3% month-over-month in October, reversing a 0.2% decrease in September, data published by the Ministry of Economy, Trade and Industry showed. Among the individual components of the survey, activity was up for medical, health care and welfare, information and communications, electricity, gas, heat supply and water, finance and insurance, business related services and goods rental and leasing. On a yearly basis, the tertiary activity index rose at a faster rate of 1.1% annually in October, following a 0.6% rise in the prior month.

Global Equities: European stocks edged up slightly as investors looked ahead to Fed, ECB meetings. Asian stocks declined as investors turned cautious after several days of advances, erasing early gains.

Indian Economy: Retail inflation rose by 4.88% in November –a 15 month high, mainly due an increase in foods and oil prices. The Consumer Price Index (CPI) hit a seven-month high at 3.58% in October, while rising 3.63 percent in November a year ago. CPI is the main price gauge that the Reserve Bank of India (RBI) tracks. Combined food price inflation, continued to witness a jump, with prices rising 1.58% in November from a 1.90% rise in October, as compared with% in 2.11% in the same period last year.

Equity Markets: Stocks slipped after previous three sessions of gains. The Sensex, and the Nifty, almost traded in negative terrain throughout the session after a shaky start. Telecom stocks dropped. Weakness in Asian stocks and subdued trading on European bourses weighed on sentiment on the domestic bourses. Market sentiment also took a hit amid surging global crude oil prices. Brent crude oil futures mounted past \$65 a barrel, stoking India's fiscal deficit concerns

Corporate News: The industrial output growth slowed to 2.2% in October as compared with 3.8% a month ago. Manufacturing sector, which accounts for more than three-fourths of the entire index, grew 2.5% in October after 3.4% growth in September. Capital goods output, which is a proxy to measure private sector investment activity, rose 6.8% in October compared with 7.4% in September. Consumer durables output slipped 6.9% in September, against a fall of 4.8% in the month before. Ministry of Finance noted that apprehensions about the negative effects of certain tax demands on the Software Industry are without basis. It was reported recently that tax officials had raised tax demand in respect of export of IT/IT enabled services provided to clients abroad. The number of Foreign Tourist Arrivals (FTAs) in November, 2017 was 10.05 lakh as compared to FTAs of 8.78 lakh in November, 2016 and 8.16 lakh in November, 2015. The growth rate in FTAs in November, 2017 over November, 2016 was 14.4%, compared to 7.6% in November, 2016 over November, 2015. FTAs during the period January- November 2017 were 90.01 lakh with a growth of 15.6% over same period of the previous year, compared to FTAs of 77.83 lakh with a growth of 9.4% in January- November, 2016 over January- November, 2015. Brent crude oil prices jumped above \$65 per barrel for the first time since 2015 after the shutdown of the Forties North Sea pipeline knocked out significant supply.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(21.2)	(92.6)	7.3
MF(INR cr)	864.4	739.4	603.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,458	28,267	31,883
F&O(INR cr)	453,633	542,100	609,892

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.3	10.6	10.9
NSE VIX	15.3	14.6	12.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,125	(1.1) %	16.6 %	Energy	14,057	(0.6) %	18.9 %
IT	11,272	(0.5) %	6.4 %	Pharma	9,119	(0.7) %	(13.2) %
Metals	3,619	(0.8) %	16.5 %	Finance	10,299	(0.9) %	16.7 %
Auto	11,331	(0.8) %	14.2 %	PSU	3,799	(0.3) %	7.7 %
FMCG	26,354	(1.3) %	11.5 %	Real Estate	318	(1.6) %	45.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Dr Reddy's	2,256	2.9 %	(17.8) %	H P C L	415	(4.1) %	20.0 %
Adani Port	403	2.7 %	17.7 %	Power Fin.	116	(3.6) %	(21.4) %
O N G C	183	2.5 %	(1.3) %	Ashok Leyl	114	(3.5) %	35.3 %
GAIL (Indi	492	2.2 %	27.8 %	Bharti Inf	355	(3.4) %	7.8 %
Havells In	546	1.4 %	16.5 %	Tata Power	91	(3.2) %	1.5 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA's Kent Gives Speech in Sydney	13-12-2017	0:00	AUD	-	-
RBA's Richard Participates in Panel in Sydney	13-12-2017	2:00	AUD	-	-
Teranet/National Bank HP Index (NOV)	13-12-2017	13:30	CAD	-	218.13
Teranet/National Bank HPI (MoM) (NOV)	13-12-2017	13:30	CAD	-	(0.01)
Teranet/National Bank HPI (YoY) (NOV)	13-12-2017	13:30	CAD	-	0.1
Euro-Zone Employment (QoQ) (3Q)	13-12-2017	10:00	EUR	-	0.004
Euro-Zone Employment (YoY) (3Q)	13-12-2017	10:00	EUR	-	0.016
Euro-Zone Industrial Production s.a. (MoM) (OCT)	13-12-2017	10:00	EUR	-	(0.006)
Euro-Zone Industrial Production w.d.a. (YoY) (OCT)	13-12-2017	10:00	EUR	-	0.033
German Consumer Price Index (MoM) (NOV F)	13-12-2017	7:00	EUR	-	0.003
German Consumer Price Index (YoY) (NOV F)	13-12-2017	7:00	EUR	-	0.018
German Wholesale Price Index (MoM) (NOV)	13-12-2017	7:00	EUR	-	0
German Wholesale Price Index (YoY) (NOV)	13-12-2017	7:00	EUR	-	0.03
Average Weekly Earnings (3M/YoY) (OCT)	13-12-2017	9:30	GBP	-	0.022
Claimant Count Rate (NOV)	13-12-2017	9:30	GBP	-	0.023
Employment Change 3M/3M (OCT)	13-12-2017	9:30	GBP	-	-
ILO Unemployment Rate 3Mths (OCT)	13-12-2017	9:30	GBP	-	0.043
Jobless Claims Change (NOV)	13-12-2017	9:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (OCT)	13-12-2017	9:30	GBP	-	0.022
BOJ Kuroda makes a brief speech at Economists' Gathering	13-12-2017	9:00	JPY	-	-
BOJ Outright Bond Purchase 1~3 Years	13-12-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	13-12-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Year	13-12-2017	1:10	JPY	-	-
Foreign Buying Japan Bonds (DEC 08)	13-12-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (DEC 08)	13-12-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (DEC 08)	13-12-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (DEC 08)	13-12-2017	23:50	JPY	-	-
Alabama Special General Election - U.S. Senate	13-12-2017	1:15	USD	-	-
Consumer Price Index (MoM) (NOV)	13-12-2017	13:30	USD	-	0.001



Consumer Price Index (YoY) (NOV)	13-12-2017	13:30	USD	-	0.02
Consumer Price Index Core Index s.a. (NOV)	13-12-2017	13:30	USD	-	253.428
Consumer Price Index Ex Food and Energy (MoM) (NOV)	13-12-2017	13:30	USD	-	0.002
Consumer Price Index Ex Food and Energy (YoY) (NOV)	13-12-2017	13:30	USD	-	0.018
Consumer Price Index n.s.a. (NOV)	13-12-2017	13:30	USD	-	246.663
DOE Cushing OK Crude Inventory (DEC 08)	13-12-2017	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (DEC 08)	13-12-2017	15:30	USD	-	-
DOE U.S. Distillate Inventory (DEC 08)	13-12-2017	15:30	USD	-	-
DOE U.S. Gasoline Inventories (DEC 08)	13-12-2017	15:30	USD	-	-
FOMC Rate Decision (Lower Bound) (DEC 13)	13-12-2017	19:00	USD	-	0.01
FOMC Rate Decision (Upper Bound) (DEC 13)	13-12-2017	19:00	USD	-	0.0125
MBA Mortgage Applications (DEC 08)	13-12-2017	12:00	USD	-	0.047
Real Avg Hourly Earning (YoY) (NOV)	13-12-2017	13:30	USD	-	0.004
Real Avg Weekly Earnings (YoY) (NOV)	13-12-2017	13:30	USD	-	0.004
Yellen Holds Press Conference Following FOMC Meeting	13-12-2017	19:30	USD	-	-

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