



14 Dec.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,193	(0.5) %	10.3 %
BSE SENSEX	33,053	(0.5) %	10.5 %
CNX BANK	25,000	(0.5) %	16.0 %
CNX MIDCAP	19,755	(1.0) %	14.0 %
CNX SMALLCAP	8,487	(1.2) %	20.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,585	0.3 %	23.7 %
S&P 500	2,663	(0.1) %	17.9 %
FTSE 100	7,497	(0.1) %	4.4 %
HANG SENG	29,222	1.5 %	31.9 %
NIKKEI	22,758	(0.5) %	16.1 %
SHANGHAI COMPOSITE	3,303	0.7 %	5.3 %

**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	(0.2) %	8.3 %
USD/JPY	113.46	0.0 %	(2.2) %
USD/AUD	1.32	(0.5) %	(3.5) %
USD/SGD	1.35	0.0 %	(5.5) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	(1.5) %	9.2 %
Gold(INR/10g)	28,411	(0.1) %	2.2 %
Gold Comex(USD/oz)	1,245	(0.0) %	7.6 %
SILVER(INR/1Kg)	36,457	(1.9) %	(6.3) %
Aluminium(USD/MT)	2,004	0.6 %	17.7 %
Copper(USD/MT)	6,614	1.0 %	18.7 %

**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:** Federal Reserve on Wednesday raised the benchmark US interest rate to a range of 1.25% to 1.5%, but struck a dovish tone on future rate hikes amid stubbornly low inflation. It was the third rate hike of 0.25% in 2017. The Fed also maintained earlier forecast for just three 1/4-point rate hikes in 2018. Averaging through hurricane-related fluctuations, job gains have been solid, and the unemployment rate declined further, the Fed's statement read. Household spending has been expanding at a moderate rate, and growth in business fixed investment has picked up in recent quarters. Eurozone industrial production increased in October, after falling in the previous month, data from Eurostat showed Wednesday. Industrial production rose a seasonally adjusted 0.2% month-on-month in October, reversing September's 0.5%, which was revised from a 0.6% decline reported earlier.

**Global Equities:** US stocks surged further after the Fed statement and hit fresh highs.

**Indian Economy:** Indian signed Financing Agreement for IBRD loan of USD 250 million (equivalent) for the "Skills Acquisition and Knowledge Awareness for Livelihood Promotion (SANKALP) Project with the World Bank. The Objective of the project is to enhance institutional mechanisms for skills development and increase access to quality and market-relevant training for the work force.

**Equity Markets:** Local indices registered modest losses in a highly volatile session of trade. Realty and metal stocks declined. Blue-chip shares L&T, Infosys and State Bank of India dropped. Key indices started the session on a subdued note and traded in negative zone till morning trade on mixed Asian cues, data showing surge in India's consumer price inflation and a moderate growth in industrial production. Key indices saw a sudden slide into negative territory in late trades.

**Corporate News:** Top carmaker Maruti Suzuki India said the company is looking at raising prices across its range of models by up to 2% from January 2018 to offset the impact of rising input costs. The Reserve Bank of India (RBI) has imposed certain restrictions on Corporation Bank on carrying out banking activities. The bank said that the RBI has triggered prompt corrective action (PCA) against it in view of high non-performing loans and requirement to raise capital. BHEL announced commissioning of a 54 MW coal-fired captive power project in Indonesia. The 3x18 MW power project located at Sangatta, East Kalimantan, Indonesia has been set up by BHEL for PT Citra Kusuma Perdana (PT CKP) for their coal-mining operations, BHEL noted.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	124.2	(61.6)	8.0
MF(INR cr)	864.4	739.4	601.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,529	28,741	31,887
F&O(INR cr)	838,733	575,059	611,200

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.9	10.6	10.9
NSE VIX	16.0	14.8	12.1

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,000	(0.5) %	16.0 %	Energy	14,085	0.2 %	19.2 %
IT	11,252	(0.2) %	6.2 %	Pharma	9,003	(1.3) %	(14.3) %
Metals	3,563	(1.5) %	14.7 %	Finance	10,249	(0.5) %	16.1 %
Auto	11,265	(0.6) %	13.5 %	PSU	3,729	(1.8) %	5.8 %
FMCG	26,160	(0.7) %	10.7 %	Real Estate	311	(2.1) %	41.9 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Shree Ceme	17,716	3.1 %	3.2 %	Interglobe	1,136	(3.8) %	8.9 %
Sun TV Net	916	2.8 %	15.2 %	Punjab Nat	168	(3.4) %	11.9 %
H P C L	423	2.0 %	22.4 %	Vedanta	284	(3.3) %	4.0 %
I O C L	402	1.8 %	5.5 %	Piramal En	2,726	(3.2) %	40.8 %
B P C L	506	1.5 %	19.0 %	DLF	228	(2.6) %	55.1 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (DEC)	14-12-2017	0:00	AUD	-	0.037
Employment Change (NOV)	14-12-2017	0:30	AUD	-	-
Full Time Employment Change (NOV)	14-12-2017	0:30	AUD	-	-
Part Time Employment Change (NOV)	14-12-2017	0:30	AUD	-	-
Participation Rate (NOV)	14-12-2017	0:30	AUD	-	0.651
Unemployment Rate (NOV)	14-12-2017	0:30	AUD	-	0.054
Bank of Canada's Poloz Speech to Canadian Club of Toronto	14-12-2017	17:25	CAD	-	-
New Housing Price Index (MoM) (OCT)	14-12-2017	13:30	CAD	-	0.002
New Housing Price Index (YoY) (OCT)	14-12-2017	13:30	CAD	-	0.038
KOF Institute Winter Economic Forecast	14-12-2017	8:00	CHF	-	-
Producer & Import Prices (MoM) (NOV)	14-12-2017	8:15	CHF	-	0.005
Producer & Import Prices (YoY) (NOV)	14-12-2017	8:15	CHF	-	0.012
SNB 3-Month Libor Lower Target Range (DEC 14)	14-12-2017	8:30	CHF	-	(0.0125)
SNB 3-Month Libor Upper Target Range (DEC 14)	14-12-2017	8:30	CHF	-	(0.0025)
SNB Sight Deposit Interest Rate (DEC 14)	14-12-2017	8:30	CHF	-	(0.0075)
Fixed Assets Ex Rural YTD (YoY) (NOV)	14-12-2017	2:00	CNY	-	0.073
Industrial Production (YoY) (NOV)	14-12-2017	2:00	CNY	-	0.062
Industrial Production YTD (YoY) (NOV)	14-12-2017	2:00	CNY	-	0.067
Retail Sales (YoY) (NOV)	14-12-2017	2:00	CNY	-	0.1
Retail Sales YTD (YoY) (NOV)	14-12-2017	2:00	CNY	-	0.103
ECB Deposit Facility Rate (DEC 14)	14-12-2017	12:45	EUR	-	(0.004)
ECB Marginal Lending Facility (DEC 14)	14-12-2017	12:45	EUR	-	0.0025
ECB President Draghi holds news conference in Frankfurt	14-12-2017	13:30	EUR	-	-
EU 25 New Car Registrations (NOV)	14-12-2017	7:00	EUR	-	0.059
European Central Bank Rate Decision (DEC 14)	14-12-2017	12:45	EUR	-	0
Markit Eurozone Composite PMI (DEC P)	14-12-2017	9:00	EUR	-	57.5
Markit Eurozone Manufacturing PMI (DEC P)	14-12-2017	9:00	EUR	-	60.1
Markit Eurozone Services PMI (DEC P)	14-12-2017	9:00	EUR	-	56.2
Markit Eurozone Composite PMI (DEC P)	14-12-2017	9:00	EUR	-	60.2



Markit France Manufacturing PMI (DEC P)	14-12-2017	8:00	EUR	-	57.7
Markit France Services PMI (DEC P)	14-12-2017	8:00	EUR	-	60.4
Markit Germany Services PMI (DEC P)	14-12-2017	8:30	EUR	-	54.3
Markit/BME Germany Composite PMI (DEC P)	14-12-2017	8:30	EUR	-	57.3
Markit/BME Germany Manufacturing PMI (DEC P)	14-12-2017	8:30	EUR	-	62.5
Bank of England Bank Rate (DEC 14)	14-12-2017	12:00	GBP	-	0.005
BOE Asset Purchase Target (DEC)	14-12-2017	12:00	GBP	-	-
BOE Corporate Bond Target (DEC)	14-12-2017	12:00	GBP	-	-
Retail Sales Ex Auto Fuel (MoM) (NOV)	14-12-2017	9:30	GBP	-	0.001
Retail Sales Ex Auto Fuel (YoY) (NOV)	14-12-2017	9:30	GBP	-	(0.003)
Retail Sales Inc Auto Fuel (MoM) (NOV)	14-12-2017	9:30	GBP	-	0.003
Retail Sales Inc Auto Fuel (YoY) (NOV)	14-12-2017	9:30	GBP	-	(0.003)
RICS House Price Balance (NOV)	14-12-2017	0:01	GBP	-	0.01
Capacity Utilization (MoM) (OCT)	14-12-2017	4:30	JPY	-	(0.015)
Industrial Production (MoM) (OCT F)	14-12-2017	4:30	JPY	-	0.005
Industrial Production (YoY) (OCT F)	14-12-2017	4:30	JPY	-	0.059
Nikkei Japan PMI Manufacturing (DEC P)	14-12-2017	0:30	JPY	-	53.6
Tankan Large All Industry Capex (4Q)	14-12-2017	23:50	JPY	-	0.077
Tankan Large Manufacturers Outlook (4Q)	14-12-2017	23:50	JPY	-	19
Tankan Large Manufacturing Index (4Q)	14-12-2017	23:50	JPY	-	22
Tankan Large Non-Manufacturing Index (4Q)	14-12-2017	23:50	JPY	-	23
Tankan Non-Manufacturing Outlook (4Q)	14-12-2017	23:50	JPY	-	19
Tankan Small Manufacturing Index (4Q)	14-12-2017	23:50	JPY	-	10
Tankan Small Manufacturing Outlook (4Q)	14-12-2017	23:50	JPY	-	8
Tankan Small Non-Manufacturing Index (4Q)	14-12-2017	23:50	JPY	-	8
Tankan Small Non-Manufacturing Outlook (4Q)	14-12-2017	23:50	JPY	-	4
Tokyo Condominium Sales (YoY) (NOV)	14-12-2017	4:00	JPY	-	(0.03)
Overnight Rate (DEC 14)	14-12-2017	19:00	MXN	-	0.07
BusinessNZ Manufacturing PMI (NOV)	14-12-2017	21:30	NZD	-	57.2
Business Inventories (OCT)	14-12-2017	15:00	USD	-	0
Continuing Claims (DEC 02)	14-12-2017	13:30	USD	-	-
EIA Natural Gas Storage Change (DEC 08)	14-12-2017	15:30	USD	-	2
EIA Working Natural Gas Implied Flow (DEC 08)	14-12-2017	15:30	USD	-	2
Export Price Index (MoM) (NOV)	14-12-2017	13:30	USD	-	0
Export Price Index (YoY) (NOV)	14-12-2017	13:30	USD	-	0.027
Import Price Index (MoM) (NOV)	14-12-2017	13:30	USD	-	0.002
Import Price Index (YoY) (NOV)	14-12-2017	13:30	USD	-	0.025
Import Price Index ex Petroleum (MoM) (NOV)	14-12-2017	13:30	USD	-	0.001
Initial Jobless Claims (DEC 09)	14-12-2017	13:30	USD	-	-
Markit US Composite PMI (DEC P)	14-12-2017	14:45	USD	-	54.5
Markit US Manufacturing PMI (DEC P)	14-12-2017	14:45	USD	-	53.9
Markit US Services PMI (DEC P)	14-12-2017	14:45	USD	-	54.5
Retail Sales Advance (MoM) (NOV)	14-12-2017	13:30	USD	-	0.002
Retail Sales Control Group (NOV)	14-12-2017	13:30	USD	-	0.003
Retail Sales Ex Auto (MoM) (NOV)	14-12-2017	13:30	USD	-	0.001
Retail Sales Ex Auto and Gas (NOV)	14-12-2017	13:30	USD	-	0.003

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