



15 Feb.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,501	(0.4) %	13.7 %
BSE SENSEX	34,156	(0.4) %	14.2 %
CNX BANK	25,341	(1.4) %	17.6 %
CNX MIDCAP	20,152	0.0 %	16.3 %
CNX SMALLCAP	8,574	(0.7) %	21.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,893	1.0 %	0.3 %
S&P 500	2,699	1.3 %	0.1 %
FTSE 100	7,214	0.6 %	(5.7) %
HANG SENG	30,516	2.3 %	0.0 %
NIKKEI	21,154	(0.4) %	(10.0) %
SHANGHAI COMPOSITE	3,199	0.5 %	(4.5) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.09	(0.5) %	0.7 %
EUR/USD	1.25	1.7 %	3.7 %
GBP/USD	1.40	1.3 %	3.6 %
USD/JPY	106.71	(1.9) %	(5.3) %
USD/AUD	1.26	(1.5) %	(1.4) %
USD/SGD	1.31	(1.0) %	(1.6) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(0.2) %	(2.0) %
Gold(INR/10g)	30,200	0.5 %	2.9 %
Gold Comex(USD/oz)	1,338	0.9 %	2.2 %
SILVER(INR/1Kg)	38,246	0.8 %	(0.9) %
Aluminium(USD/MT)	2,124	(0.3) %	(5.9) %
Copper(USD/MT)	6,908	1.8 %	(3.8) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.4 %

**Global Economy:** Consumer prices in the US increased by more than expected in the month of January, according to a report released by the Labor Department on Wednesday. The Labor Department said its consumer price index climbed by 0.5% in January after edging up by a revised 0.2% in December. The bigger than expected increase in consumer prices was partly due to a jump in energy prices, which soared by 3% in January after falling by 0.2% in December. Excluding food and energy prices, core consumer prices rose by 0.3% in January after gaining by 0.2% in December. US retail sales slipped in January, recording their biggest drop in nearly a year. The Commerce Department said that retail sales decreased 0.3% last month.

**Global Equities:** Strong gains were seen in the US stocks with the NASDAQ soaring by nearly 2% as buying continued to support the momentum after recent losses.

**Indian Economy:** The number of Foreign Tourist Arrivals (FTAs) in January, 2018 was 10.66 lakh as compared to FTAs of 9.83 lakh in January, 2017 and 8.45 lakh in January, 2016. The growth rate in FTAs in January, 2018 over January, 2017 was 8.4%, compared to 16.4% in January, 2017 over January, 2016.

**Equity Markets:** Key benchmark indices settled with modest losses after a sudden late sell-off in bank stocks after Punjab National Bank (PNB) said it detected a \$1771.69-million fraud at a single branch in Mumbai. Indices opened higher on firm Asian stocks. The market soon pared gains and swung between the gains and losses near the flat line in morning trade. Indices traded with small gains in mid-morning trade but soon trimmed gains and hovered near the flat line till afternoon trade. The market witnessed a sudden sell-off in late trading moves.

**Corporate News:** Sun Pharmaceutical Industries' (Sun Pharma) consolidated net profit fell 75.17% to Rs 365.39 crore on 16.04% decline in total revenue from operations to Rs 6653.23 crore in Q3 December 2017 over Q3 December 2016. The results were announced after market hours yesterday, 14 February 2018. Sun Pharma's bottom line in Q3 December 2017 was adversely impacted by one-time deferred tax adjustment of Rs 513 crore related to changes in US tax rates. Nestle India's net profit rose 59.58% to Rs 311.83 crore on 10.23% increase in revenue from operations to Rs 2601.46 crore in Q4 December 2017 over Q4 December 2016. Jet Airways (India)'s net profit declined 45.9% to Rs 165.25 crore on 10.4% increase in net sales to Rs 6086.20 crore in Q3 December 2017 over Q3 December 2016.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(136.8)	(113.5)	10.3
MF(INR cr)	826.0	696.6	563.5

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	39,354	41,824	33,501
F&O(INR cr)	710,779	844,626	641,028

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.0	26.5	11.5
NSE VIX	17.2	17.4	12.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,341	(1.4) %	17.6 %	Energy	13,879	0.4 %	17.4 %
IT	12,420	(0.0) %	17.3 %	Pharma	9,249	(1.0) %	(11.9) %
Metals	4,025	(0.1) %	29.6 %	Finance	10,498	(0.6) %	18.9 %
Auto	11,336	(0.3) %	14.3 %	PSU	3,307	(4.8) %	(6.2) %
FMCG	26,645	(0.5) %	12.7 %	Real Estate	335	0.3 %	52.8 %

### NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
GlaxoSmith	6,432	7.7 %	24.1 %	Punjab Nat	146	(9.8) %	(2.7) %
Tech Mahin	612	3.6 %	35.0 %	Yes Bank	320	(4.5) %	4.1 %
Ashok Leyl	137	3.1 %	63.4 %	St Bk of I	276	(4.3) %	(5.8) %
Indiabulls	1,348	2.5 %	35.4 %	Axis Bank	544	(3.6) %	8.6 %
Bharti Air	435	2.5 %	27.2 %	Bharti Inf	327	(3.2) %	(0.7) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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