



16 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,742	0.6 %	16.3 %
BSE SENSEX	34,844	0.7 %	16.5 %
CNX BANK	26,069	1.2 %	21.0 %
CNX MIDCAP	21,697	0.0 %	25.2 %
CNX SMALLCAP	9,580	0.2 %	35.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,803	0.9 %	3.9 %
S&P 500	2,786	0.7 %	3.4 %
FTSE 100	7,769	(0.1) %	1.6 %
HANG SENG	31,339	(0.2) %	2.7 %
NIKKEI	23,715	0.3 %	0.9 %
SHANGHAI COMPOSITE	3,410	(0.5) %	1.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.49	(0.3) %	(0.3) %
EUR/USD	1.23	1.7 %	2.0 %
GBP/USD	1.38	1.8 %	2.0 %
USD/JPY	110.88	(0.4) %	(1.6) %
USD/AUD	1.26	(0.8) %	(1.7) %
USD/SGD	1.32	(0.4) %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	0.8 %	6.5 %
Gold(INR/10g)	29,838	0.0 %	1.6 %
Gold Comex(USD/oz)	1,339	0.9 %	2.3 %
SILVER(INR/1Kg)	38,732	0.6 %	0.3 %
Aluminium(USD/MT)	2,215	1.7 %	(1.8) %
Copper(USD/MT)	7,071	(0.7) %	(1.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	0.0 %	0.1 %

Global Economy: The world economy is gaining strength but structural issues such as weak wage growth and rapid asset appreciation need to be addressed, an IMF official said on Monday. The bottom line is that the cyclical recovery in the global economy is going from strength to strength, IMF first deputy managing director David Lipton said in a speech to the Asian Financial Forum, according to media reports. The Euro area trade surplus increased in November from October, data from Eurostat showed Monday. The trade surplus rose to a seasonally adjusted EUR 22.5 billion from EUR 19 billion in the previous month. Exports grew 3.4% month-on-month to EUR 187.1 billion and imports climbed 1.6% to EUR 164.6 billion. On an unadjusted basis, the trade surplus came in at EUR 26.3 billion versus EUR 23.8 billion in the previous year. Exports logged an annual growth of 7.7 percent and imports gained 7.3%. The EU28 registered a EUR 8.0 billion surplus in trade in goods with the rest of the world in November compared with EUR 5.5 billion in the previous year.

Global Equities: European stocks witnessed a sluggish trade on Monday as the dollar continued its downward spiral against the Euro. Dollar index is at a three year low.

Indian Economy: The Wholesale Price Index (WPI)-based inflation, base year 2011-12, eased to three-month low of 3.6% in December 2017 from 3.9% in November 2017, while snapping increase for last two straight months. Among the three major components of the WPI index, the inflation for primary articles dipped entirely contributing to the decline in overall inflation in December 2017. The inflation for manufactured products group was stable and that for fuel products moved up in December 2017. Core inflation (manufactured products excluding foods products) was nearly flat at 3.1% in December 2017.

Equity Markets: Local stocks started the week on a jubilant note as key benchmark indices posted decent gains, with indices hitting fresh record highs. Data showing India's industrial production surging at 25-month high pace of 8.4% in November boosted sentiment. Both the Sensex, and the Nifty, hit record highs on intraday as well as on closing basis. Key indices gained for the third straight day. Stocks of public sector banks nudged higher. Stocks of private sector banks were mixed.

Corporate News: Drug major Lupin said it has forayed into over-the-counter (OTC) segment in the country with plans to touch Rs 300 crore turnover in the vertical over the next five years. The firm has introduced its legacy product 'Softovac' across the country as an OTC medicine. Private equity firms invested USD 23.8 billion across 591 deals in 2017, making it the biggest year for PE investments in India. According to deal tracker Venture Intelligence, the investment value is 39% higher than the previous high of \$17.1 billion (recorded in 2015) and 55% higher than \$15.4 billion invested during 2016, according to media reports. Domestic Diesel prices tested a record high of Rs 61.74 per litre and petrol prices hit a three year high of Rs 71.20 per litre in Delhi as international oil rates continue to spurt.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(4.6)	25.5	6.8
MF(INR cr)	278.2	255.9	560.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,310	37,500	32,489
F&O(INR cr)	579,640	583,375	618,826

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.2	9.6	10.8
NSE VIX	14.3	13.7	12.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,069	1.2 %	21.0 %	Energy	14,410	(0.2) %	21.9 %
IT	11,993	(0.9) %	13.2 %	Pharma	9,660	(0.8) %	(8.0) %
Metals	4,196	0.1 %	35.1 %	Finance	10,786	2.4 %	22.2 %
Auto	11,794	(1.0) %	18.9 %	PSU	3,646	0.2 %	3.4 %
FMCG	27,171	(0.1) %	14.9 %	Real Estate	367	0.0 %	67.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HD F C	1,871	6.3 %	22.0 %	Idea Cellu	105	(3.7) %	22.9 %
ICICI Bank	329	3.7 %	26.3 %	GAIL (Indi	489	(2.4) %	27.2 %
ICICI Pru	418	3.1 %	8.4 %	Eicher Mot	27,982	(2.3) %	9.5 %
Ambuja Cem	277	2.8 %	16.6 %	Tata Motor	246	(2.3) %	(12.4) %
UltraTech	4,520	2.6 %	12.3 %	O N G C	197	(2.1) %	5.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
New Motor Vehicle Sales (MoM) (DEC)	16-01-2018	0:30	AUD	-	0.001
New Motor Vehicle Sales (YoY) (DEC)	16-01-2018	0:30	AUD	-	0.021
Westpac Consumer Conf Index (JAN)	16-01-2018	23:30	AUD	-	103.3
Westpac Consumer Confidence (JAN)	16-01-2018	23:30	AUD	-	0.036
SNB President Jordan Speaks in Zurich	16-01-2018	17:00	CHF	-	-
German Consumer Price Index (MoM) (DEC F)	16-01-2018	7:00	EUR	-	0.006
German Consumer Price Index (YoY) (DEC F)	16-01-2018	7:00	EUR	-	0.017
German Wholesale Price Index (MoM) (DEC)	16-01-2018	7:00	EUR	-	0.005
German Wholesale Price Index (YoY) (DEC)	16-01-2018	7:00	EUR	-	0.033
Consumer Price Index (MoM) (DEC)	16-01-2018	9:30	GBP	-	0.003
Consumer Price Index (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.031
Core Consumer Price Index (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.027
CPIH (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.028
House Price Index (YoY) (NOV)	16-01-2018	9:30	GBP	-	0.045
Producer Price Index Input n.s.a. (MoM) (DEC)	16-01-2018	9:30	GBP	-	0.018
Producer Price Index Input n.s.a. (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.073
Producer Price Index Output Core n.s.a. (MoM) (DEC)	16-01-2018	9:30	GBP	-	0.002
Producer Price Index Output Core n.s.a. (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.022
Producer Price Index Output n.s.a. (MoM) (DEC)	16-01-2018	9:30	GBP	-	0.003
Producer Price Index Output n.s.a. (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.03
Retail Price Index (DEC)	16-01-2018	9:30	GBP	-	275.8
Retail Price Index (MoM) (DEC)	16-01-2018	9:30	GBP	-	0.002
Retail Price Index (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.039
Retail Price Index Ex Mort Int.Payments (YoY) (DEC)	16-01-2018	9:30	GBP	-	0.04
Woods, Boss and Yallop testify on PRA before U.K. lawmakers.	16-01-2018	9:15	GBP	-	-
Bankruptcies (YoY) (DEC)	16-01-2018	4:30	JPY	-	(0.023)
Machine Orders (MoM) (NOV)	16-01-2018	23:50	JPY	-	0.05
Machine Orders (YoY) (NOV)	16-01-2018	23:50	JPY	-	0.023
Textiles Industry Index (MoM) (NOV)	16-01-2018	4:30	INR	-	0.002



ANZ Truckometer Heavy (MoM) (DEC)	16-01-2018	21:00	NZD	-	0.011
Non Resident Bond Holdings (DEC)	16-01-2018	2:00	NZD	-	0.604
Empire Manufacturing (JAN)	16-01-2018	13:30	USD	-	18
U.S. to Sell USD42 Bln 6-Month Bills	16-01-2018	16:30	USD	-	-
U.S. to Sell USD45 Bln 4-Week Bills	16-01-2018	16:30	USD	-	-
U.S. to Sell USD48 Bln 3-Month Bills	16-01-2018	16:30	USD	-	-

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