



18 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,900	1.0 %	18.0 %
BSE SENSEX	35,082	0.9 %	18.3 %
CNX BANK	26,289	0.0 %	22.0 %
CNX MIDCAP	21,516	0.0 %	24.1 %
CNX SMALLCAP	9,435	0.0 %	33.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,116	1.3 %	5.2 %
S&P 500	2,803	0.9 %	4.0 %
FTSE 100	7,725	(0.4) %	1.0 %
HANG SENG	31,983	0.3 %	4.8 %
NIKKEI	23,868	(0.4) %	1.5 %
SHANGHAI COMPOSITE	3,445	0.2 %	2.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.89	0.6 %	0.3 %
EUR/USD	1.22	(0.5) %	1.6 %
GBP/USD	1.38	0.3 %	2.3 %
USD/JPY	111.25	0.3 %	(1.3) %
USD/AUD	1.26	(0.1) %	(1.8) %
USD/SGD	1.32	0.1 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	(0.9) %	5.6 %
Gold(INR/10g)	30,094	0.1 %	2.5 %
Gold Comex(USD/oz)	1,339	(0.2) %	2.3 %
SILVER(INR/1Kg)	39,084	(0.2) %	1.2 %
Aluminium(USD/MT)	2,172	(2.5) %	(3.7) %
Copper(USD/MT)	7,023	(2.2) %	(2.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	(0.0) %	0.1 %

Global Economy: US industrial production increased more than expected in December as unseasonably cold weather at the end of the month boosted demand for heating. The Fed said industrial output surged 0.9% last month also buoyed by robust gains in mining production, after slipping 0.1% in November. The world is entering a critical period of intensified risk in 2018, the World Economic Forum said in the Global Risks Report 2018, published on Wednesday. According to the annual report, structural and interconnected nature of risks in 2018 threatens the very system on which societies, economies and international relations are based. The global risks perception survey indicated that experts are preparing for another period of heightened risk. They cited deteriorating geopolitical landscape for the pessimistic outlook in 2018. Among the 30 global risks the experts were asked to prioritize in terms of likelihood and impact, all five environmental risks namely extreme weather; biodiversity loss and ecosystem collapse; major natural disasters; man-made environmental disasters; and failure of climate-change mitigation and adaptation - were ranked highly on both dimensions, the report said.

Global Equities: The Dow Jones industrial average closed above 26,000 points for the first time on Wednesday amid supportive economic data and upbeat sentiments.

Indian Economy: Provisional figures of Direct Tax collections up to 15th January, 2018 show that net collections are at Rs. 6.89 lakh crore which is 18.7% higher than the net collections for the corresponding period of last year. The net Direct Tax collections represent 70.3% of the total Budget Estimates of Direct Taxes for F.Y. 2017-18 (Rs. 9.8 lakh crore). Gross collections (before adjusting for refunds) have increased by 13.5% to Rs. 8.11 lakh crore during April, 2017 to 15th January, 2018. Refunds amounting to Rs.1.22 lakh crore have been issued during April, 2017 to 15th January, 2018.

Equity Markets: Domestic stocks scored strong gains on across the board buying in index pivots. Both the Sensex, and the Nifty, hit record high levels on intraday as well as on closing basis. The Sensex settled at record high above the psychological 35,000-mark. The Nifty also shut shop at record high. Today's gains were led by index pivots Infosys, ICICI Bank and Axis Bank. The announcement of reduction in additional borrowing by the government allaying fiscal deficit concerns and expectation of big ticket changes in the Goods and Services Tax (GST) in the GST council's next meet boosted sentiment. Indices bucked weak trend in global stocks.

Corporate News: Hindustan Unilever Net profit rose 28% to Rs 1326 crores in Q3 December 2017 over Q3 December 2016. The results are comparable reflecting accounting impact of GST (Excise duty and net input taxes adjusted from sales of base quarter and GST refunds to the reported sales of current quarter. Earnings before interest, tax, depreciation and amortization (EBITDA) rose 24% to Rs 1680 crore in Q3 December 2017 over Q3 December 2016. Zee Entertainment Enterprises consolidated net profit rose 28.28% to Rs 321.72 crore on 11.5% rise in total revenue to Rs 1886.11 crore in Q3 December 2017 over Q3 December 2016. Realtors' body NAREDCO has demanded that effective GST rates should be halved to 6 percent on under construction properties and also asked to raise deduction limit on home loan interest to Rs 3 lakh in this year.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	117.0	33.0	7.4
MF(INR cr)	(6.8)	294.8	559.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	45,030	38,754	32,622
F&O(INR cr)	910,681	609,702	620,190

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.7	9.9	10.8
NSE VIX	13.9	13.8	12.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,289	1.2 %	22.0 %	Energy	14,141	0.3 %	19.6 %
IT	12,531	0.8 %	18.3 %	Pharma	9,744	1.3 %	(7.2) %
Metals	4,118	1.0 %	32.6 %	Finance	10,838	0.9 %	22.8 %
Auto	11,693	0.4 %	17.9 %	PSU	3,691	4.2 %	4.7 %
FMCG	27,045	0.6 %	14.4 %	Real Estate	358	0.9 %	63.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Punjab Nat	176	6.0 %	17.1 %	Zee Entert	593	(3.3) %	12.2 %
Bank of Ba	165	5.3 %	(4.2) %	Emami	1,237	(2.9) %	17.9 %
Axis Bank	585	3.9 %	16.9 %	Sun TV Net	1,058	(1.9) %	33.1 %
St Bk of I	307	3.7 %	4.8 %	Wipro	326	(1.9) %	28.5 %
ICICI Bank	343	2.7 %	31.7 %	Petronet L	235	(1.7) %	13.3 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (JAN)	18-01-2018	0:00	AUD	-	0.037
Employment Change (DEC)	18-01-2018	0:30	AUD	-	-
Full Time Employment Change (DEC)	18-01-2018	0:30	AUD	-	-
Part Time Employment Change (DEC)	18-01-2018	0:30	AUD	-	-
Participation Rate (DEC)	18-01-2018	0:30	AUD	-	0.655
RBA Foreign Exchange Transaction (Australian dollar) (DEC)	18-01-2018	0:30	AUD	-	-
RBA FX Transactions Government (DEC)	18-01-2018	0:30	AUD	-	-
RBA FX Transactions Other (DEC)	18-01-2018	0:30	AUD	-	-
Unemployment Rate (DEC)	18-01-2018	0:30	AUD	-	0.054
ADP Canada Employment Report Published	18-01-2018	13:30	CAD	-	-
China December Property Prices	18-01-2018	1:30	CNY	-	-
Fixed Assets Ex Rural YTD (YoY) (DEC)	18-01-2018	7:00	CNY	-	0.072
Gross Domestic Product (YoY) (4Q)	18-01-2018	7:00	CNY	-	0.068
Gross Domestic Product s.a. (QoQ) (4Q)	18-01-2018	7:00	CNY	-	0.017
Gross Domestic Product YTD (YoY) (4Q)	18-01-2018	7:00	CNY	-	0.069
Industrial Production (YoY) (DEC)	18-01-2018	7:00	CNY	-	0.061
Industrial Production YTD (YoY) (DEC)	18-01-2018	7:00	CNY	-	0.066
Retail Sales (YoY) (DEC)	18-01-2018	7:00	CNY	-	0.102
Retail Sales YTD (YoY) (DEC)	18-01-2018	7:00	CNY	-	0.103
ECB's Coeure speaks on a panel in Frankfurt	18-01-2018	14:30	EUR	-	-
ECB's Weidmann, Coeure, IMF's Lagarde speak in Frankfurt	18-01-2018	8:15	EUR	-	-
RICS House Price Balance (DEC)	18-01-2018	0:01	GBP	-	0
Capacity Utilization (MoM) (NOV)	18-01-2018	4:30	JPY	-	0.002
Industrial Production (MoM) (NOV F)	18-01-2018	4:30	JPY	-	0.006
Industrial Production (YoY) (NOV F)	18-01-2018	4:30	JPY	-	0.037
BusinessNZ Manufacturing PMI (DEC)	18-01-2018	21:30	NZD	-	57.7
Building Permits (DEC)	18-01-2018	13:30	USD	-	-
Building Permits (MoM) (DEC)	18-01-2018	13:30	USD	-	(0.014)
Continuing Claims (JAN)	18-01-2018	12:30	USD	-	-



DOE Cushing OK Crude Inventory (JAN 12)	18-01-2018	16:00	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 12)	18-01-2018	16:00	USD	-	-
DOE U.S. Distillate Inventory (JAN 12)	18-01-2018	16:00	USD	-	-
DOE U.S. Gasoline Inventories (JAN 12)	18-01-2018	16:00	USD	-	-
EIA Natural Gas Storage Change (JAN 12)	18-01-2018	15:30	USD	-	(359)
EIA Working Natural Gas Implied Flow (JAN 12)	18-01-2018	15:30	USD	-	(359)
Housing Starts (DEC)	18-01-2018	13:30	USD	-	-
Housing Starts (MoM) (DEC)	18-01-2018	13:30	USD	-	0.033
Initial Jobless Claims (JAN 13)	18-01-2018	13:30	USD	-	-
Philadelphia Fed Business Outlook (JAN)	18-01-2018	13:30	USD	-	26.2
U.S. to Sell USD13 Bln 10-Year TIPS	18-01-2018	18:00	USD	-	-

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