



18 Dec.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,333	0.8 %	11.9 %
BSE SENSEX	33,463	0.7 %	11.9 %
CNX BANK	25,440	1.1 %	18.1 %
CNX MIDCAP	19,962	1.0 %	15.2 %
CNX SMALLCAP	8,552	1.1 %	20.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,652	0.6 %	24.0 %
S&P 500	2,676	0.9 %	18.5 %
FTSE 100	7,491	0.6 %	4.4 %
HANG SENG	28,848	(1.1) %	30.2 %
NIKKEI	22,553	(0.6) %	15.1 %
SHANGHAI COMPOSITE	3,266	(0.8) %	4.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.05	(0.5) %	(5.0) %
EUR/USD	1.17	(0.3) %	10.8 %
GBP/USD	1.33	(0.9) %	8.3 %
USD/JPY	112.60	0.4 %	(2.9) %
USD/AUD	1.31	0.3 %	(4.4) %
USD/SGD	1.35	0.2 %	(5.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	0.5 %	9.6 %
Gold(INR/10g)	28,549	0.5 %	2.6 %
Gold Comex(USD/oz)	1,258	0.1 %	8.7 %
SILVER(INR/1Kg)	36,644	0.5 %	(5.9) %
Aluminium(USD/MT)	2,036	0.9 %	19.6 %
Copper(USD/MT)	6,736	0.2 %	20.8 %

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: After reporting an impressive increase in US industrial production in the previous month, the Federal Reserve released a report on Friday showing that production rose by less than expected in the month of November. The Fed said industrial production edged up by 0.2% in November after soaring by an upwardly revised 1.2% in October. The Fed noted that total industrial production would have been unchanged in November excluding the post-hurricane rebound in oil and gas extraction. Germany's central bank raised its growth projections but the pace of expansion is forecast to slow through 2020. The largest euro area economy is forecast to grow 2.6% this year and 2.5% in 2018. The projection for 2017 was revised up from 1.9% and that for 2018 from 1.7%. The economy is experiencing a strong upswing. Russia's central bank cut the benchmark rate by half a percentage point and signaled further easing in the first half of 2018. The bank trimmed the key rate to 7.75% from 8.25%.

Global Equities: US stocks jumped and all three of the major averages to new record closing highs on Friday. Markets remain hopeful about Republican lawmakers passing tax reform legislation.

Indian Economy: GST Council on Saturday decided to implement the e-way bill mechanism throughout the country by June 1 after reviewing the readiness of the IT network. Under the e-way bill system, goods worth more than Rs 50,000 have to be pre-registered online before they can be moved from one state to another. The 24th meeting of the GST Council, held on Saturday through video conferencing under the chairmanship of Finance Minister Arun Jaitley, discussed the implementation of the e-way bill system in the country after reviewing readiness of hardware and software for its launch.

Equity Markets: Local indices ended on a positive note after exit poll results on Thursday predicted a win-win situation for the Bharatiya Janata Party (BJP) in poll-bound Gujarat and Himachal Pradesh. The trade deficit narrowed marginally to \$13.82 billion in November, even as merchandise exports rose 30.55 per cent and gold imports saw a sharp drop. The trade deficit had widened to a near three-year high of \$14.02 billion in October. Data released on Friday showed that merchandise exports rose \$26.19 billion in November this year, compared to \$20 billion in November 2016. Exports of chemicals, petroleum products, engineering goods and gems and jewellery saw significant growth in November.

Corporate News: Private sector lender HDFC Bank has issued 3 lakh instant credit cards within a year of its launch. Launched in January this year, InstaCard is delivered to customers within an hour of applying for a credit card in quick and easy steps on net-banking, HDFC Bank said in a statement. Raymond launched its first ever Rs 250 crore linen manufacturing plant at Amravati that will cater to the company's own brands, domestic and international markets. The facility is expected to produce 1,200 tonnes of linen yarns and 4.8 million meters of linen and blended fabrics per annum. Deepak Fertilisers and Petrochemicals Corporation Ltd said that an arbitration tribunal has rejected GAIL's claim of Rs 357 crore against the company for supply of domestic natural gas. Power equipment maker BHEL has won a Rs 7,300 crore order for setting up a Supercritical Thermal Power Project (TPP) in Tamil Nadu.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	72.3	(33.0)	8.7
MF(INR cr)	864.4	739.4	601.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	28,942	28,761	31,870
F&O(INR cr)	454,995	625,283	613,913

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	9.4	10.4	10.9
NSE VIX	14.9	14.9	12.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,440	1.1 %	18.1 %	Energy	14,204	0.1 %	20.2 %
IT	11,288	0.1 %	6.6 %	Pharma	9,100	0.3 %	(13.4) %
Metals	3,666	2.7 %	18.0 %	Finance	10,418	1.0 %	18.0 %
Auto	11,448	1.3 %	15.4 %	PSU	3,735	(0.2) %	5.9 %
FMCG	26,431	0.2 %	11.8 %	Real Estate	317	1.7 %	44.8 %

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>
Vedanta	298	4.7 %	9.3 %	Tech Mahin	501	(2.6) %	10.5 %
Yes Bank	316	3.9 %	2.6 %	Cipla	576	(2.4) %	(2.7) %
M & M	1,483	3.6 %	15.3 %	Glaxosmi.	2,369	(1.2) %	(13.4) %
JSW Steel	251	3.5 %	32.8 %	NHPC Ltd	28	(1.0) %	(11.8) %
Coal India	271	3.1 %	(8.1) %	Godrej Con	988	(0.9) %	16.5 %

EVENTS CALENDAR

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

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