



19 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,817	0.3 %	17.1 %
BSE SENSEX	35,260	0.5 %	17.9 %
CNX BANK	26,537	0.9 %	23.2 %
CNX MIDCAP	21,098	(1.9) %	21.7 %
CNX SMALLCAP	9,201	(2.5) %	30.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,018	(0.4) %	4.8 %
S&P 500	2,798	(0.2) %	3.8 %
FTSE 100	7,701	(0.3) %	0.7 %
HANG SENG	32,122	0.4 %	5.3 %
NIKKEI	23,763	(0.4) %	1.1 %
SHANGHAI COMPOSITE	3,475	0.9 %	3.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.89	(0.2) %	0.3 %
EUR/USD	1.22	(0.8) %	1.6 %
GBP/USD	1.38	0.0 %	2.3 %
USD/JPY	111.25	0.8 %	(1.3) %
USD/AUD	1.26	0.3 %	(1.8) %
USD/SGD	1.32	0.4 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	0.4 %	6.0 %
Gold(INR/10g)	30,094	0.1 %	2.5 %
Gold Comex(USD/oz)	1,326	(0.9) %	1.3 %
SILVER(INR/1Kg)	38,649	(1.1) %	0.1 %
Aluminium(USD/MT)	2,187	0.7 %	(3.1) %
Copper(USD/MT)	7,047	0.3 %	(1.9) %

FIXED INCOME

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

Global Economy: Growth in activity in the Philadelphia-area manufacturing sector slowed by more than anticipated in the month of January, the Federal Reserve Bank of Philadelphia revealed in a report on Thursday. The Philly Fed said its index for current manufacturing activity in the region slipped to 22.2 in January. A report released by the Commerce Department showed a sharp drop in new residential construction in the US in the month of December. The report said housing starts tumbled by 8.2 percent to an annual rate of 1.192 million in December. China's National Bureau of Statistics announced that the economy had expanded 6.9% last year, up slightly from 6.7% in 2016 and breaking a trend of gradual slowing that had begun in 2011. For the fourth quarter, it reported growth of 6.8% over a year earlier. Another data showed that China's industrial output picked up in December. Value-added industrial output, a rough proxy for economic growth, expanded 6.2% in December from a year earlier, compared with a 6.1% increase in November, the National Bureau of Statistics said.

Global Equities: DOW saw some selling pressure after recent surge. Asian and European stocks nudged higher amid optimism over global growth prospects.

Indian Economy: India - China trade is improving in favour of India, according to a latest update from the PHD Chamber. While appreciating the remarkable turnaround by Indian exports during November 2017, Anil Khaitan, President, PHD Chamber of Commerce and Industry said that India has seen a major breakthrough in its exports to China during last few months whereas the surge in imports for Chinese products in Indian market is on deceleration. India's exports to China grew by 72% in October 2017 whereas growth of imports from China was only 4.2%.

Equity Markets: Local stocks registered modest gains in a highly volatile session of trade. Bulk of the the gains were triggered by reports indicating that the government is mulling a proposal to hike foreign direct investment (FDI) limit in the banking sector. Positive global stocks also underpinned sentiment. However, heavy selling in Reliance Industries, Tata Steel, Adani Ports and Special Economic Zone and State Bank of India in the afternoon session checked the gains. Realty and metal stocks dropped sharply.

Corporate News: Pharma major Biocon and Sandoz, the generic division of Novartis pharma today announced a global partnership to develop, manufacture and commercialize multiple biosimilars in immunology and oncology for patients worldwide. YES Bank reported a 22% increase in third quarter net profit at Rs 1,077 crore against Rs 883 crore in the year-ago period. Net interest income was up 27 per cent year-on-year (yoy) at Rs 1,889 crore. Non-interest income jumped 40% at Rs 1,422 crore. Total assets grew by 36% yoy to Rs 2,65,432 crore. Deposits grew by 30% yoy to Rs 1,71,731.4 crore. Gross non-performing assets (GNPAs) as a percentage of total advances rose to 1.72% against 0.85% in the year-ago quarter. During the quarter, GNPAs increased by Rs 254 crore to Rs 2,974 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	126.4	40.2	8.1
MF(INR cr)	543.7	352.9	562.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	48,569	39,455	32,702
F&O(INR cr)	1,658,044	684,584	625,379

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.9	10.0	10.8
NSE VIX	14.0	13.8	12.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,537	0.9 %	23.2 %	Energy	13,994	(1.0) %	18.4 %
IT	12,571	0.3 %	18.7 %	Pharma	9,626	(1.2) %	(8.4) %
Metals	3,999	(2.9) %	28.8 %	Finance	10,952	1.1 %	24.1 %
Auto	11,662	(0.3) %	17.5 %	PSU	3,631	(1.6) %	3.0 %
FMCG	27,348	1.1 %	15.7 %	Real Estate	344	(3.9) %	56.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Godrej Con	1,035	3.6 %	22.1 %	Bharti Inf	344	(6.1) %	4.3 %
Indiabulls	1,244	2.8 %	24.9 %	DLF	250	(4.7) %	70.4 %
ITC	273	2.8 %	(2.9) %	Hind.Zinc	308	(4.6) %	5.7 %
UPL	801	2.5 %	8.8 %	NHPC Ltd	29	(4.5) %	(8.7) %
HDFC Bank	1,934	2.3 %	35.0 %	S A I L	92	(4.4) %	46.3 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
International Securities Transactions (Canadian dollar) (NOV)	19-01-2018	13:30	CAD	-	-
Manufacturing Sales (MoM) (NOV)	19-01-2018	13:30	CAD	-	(0.004)
Producer & Import Prices (MoM) (DEC)	19-01-2018	8:15	CHF	-	0.006
Producer & Import Prices (YoY) (DEC)	19-01-2018	8:15	CHF	-	0.018
Euro-Zone Current Account n.s.a. (euros) (NOV)	19-01-2018	9:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (NOV)	19-01-2018	9:00	EUR	-	-
German Producer Price Index (MoM) (DEC)	19-01-2018	7:00	EUR	-	0.001
German Producer Price Index (YoY) (DEC)	19-01-2018	7:00	EUR	-	0.025
Retail Sales Ex Auto Fuel (MoM) (DEC)	19-01-2018	9:30	GBP	-	0.012
Retail Sales Ex Auto Fuel (YoY) (DEC)	19-01-2018	9:30	GBP	-	0.015
Retail Sales Inc Auto Fuel (MoM) (DEC)	19-01-2018	9:30	GBP	-	0.011
Retail Sales Inc Auto Fuel (YoY) (DEC)	19-01-2018	9:30	GBP	-	0.016
BOJ Outright Bond Purchase 10~25 Years	19-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	19-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	19-01-2018	1:10	JPY	-	-
Baker Hughes U.S. Rig Count (JAN 19)	19-01-2018	18:00	USD	-	939
Fed's Quarles Speaks on Bank Regulation	19-01-2018	18:00	USD	-	-
U. of Mich. 1 Yr Inflation (JAN P)	19-01-2018	15:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (JAN P)	19-01-2018	15:00	USD	-	0.024
U. of Mich. Current Conditions (JAN P)	19-01-2018	15:00	USD	-	113.8
U. of Mich. Expectations (JAN P)	19-01-2018	15:00	USD	-	84.3
U. of Mich. Sentiment (JAN P)	19-01-2018	15:00	USD	-	95.9

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