



19 Dec.2017

## INDEX PERFORMANCE

| INDIAN INDICES     | LATEST | % 1D  | % YTD  |
|--------------------|--------|-------|--------|
| CNX NIFTY          | 10,389 | 0.5 % | 12.5 % |
| BSE SENSEX         | 33,602 | 0.4 % | 12.3 % |
| CNX BANK           | 25,595 | 0.6 % | 18.8 % |
| CNX MIDCAP         | 20,130 | 0.8 % | 16.1 % |
| CNX SMALLCAP       | 8,570  | 0.2 % | 21.2 % |
| GLOBAL INDICES     | LATEST | % 1D  | % YTD  |
| DOW JONES          | 24,792 | 0.6 % | 24.7 % |
| S&P 500            | 2,690  | 0.5 % | 19.1 % |
| FTSE 100           | 7,537  | 0.6 % | 5.0 %  |
| HANG SENG          | 29,050 | 0.7 % | 31.2 % |
| NIKKEI             | 22,902 | 1.6 % | 16.9 % |
| SHANGHAI COMPOSITE | 3,268  | 0.1 % | 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:** National Association of Home Builders released a report on Monday showing an unexpected jump in US homebuilder confidence in the month of December. The report said the NAHB/Wells Fargo Housing Market Index jumped to 74 in December from a downwardly revised 69 in November. Eurozone consumer price inflation rose slightly as estimated in November, final data from Eurostat showed. Consumer prices advanced 1.5% year-on-year in November, following October's 1.4% increase. The rate came in line with the flash estimate published on November 30th. UK manufacturing order books were close to a 30-year high in the fourth quarter, monthly Industrial Trends survey from the Confederation of British Industry showed Monday. About 28% of manufacturers reported that total order books were above normal, and 11% said they were below normal, giving a balance of +17%, which was the joint highest with last month and August 1988.

**Global Equities:** US stocks explored fresh highs on supportive outlook for Republican tax reform, which would cut corporate and individual tax rates.

**Indian Economy:** Gross Non-performing Assets (NPAs) of banks crossed Rs 8.50 lakh crore at the end of September 2017, Minister of State for Finance Pratap Shukla informed the Lok Sabha. Reserve Bank of India (RBI) has informed that the growth in provisions for NPAs of Public Sector Banks (PSBs) in the first half of the current financial year (as on September 30, 2017 over March 31, 2017) was 9.5%, he stated in a written reply to the house.

**Equity Markets:** Local indices recovered after a massive correction in early moves. After witnessing sharp volatility at the onset of the session, markets edged up as assembly elections results showed that BJP will return to power for a sixth straight term in Gujarat and will beat Congress rule to form government in Himachal Pradesh. Positive cues from global markets also lifted investor spirits. Both the Sensex, and the Nifty, gained for the third straight session.

**Corporate News:** The High Court in Nairobi, Kenya, exempted Bharti Airtel from paying about \$20 million to the African country's communications regulator as a condition to obtain radio frequency spectrum and operating licences it got after acquiring and merging with Essar Telecom Kenya Ltd. The Adani Group said it had cancelled plans with Downer EDI Ltd to help develop and run its Carmichael coal mine in Australia after failing to secure a cheap government loan for the A\$16.5 billion (\$13 billion) project. Metal counters could be in focus as COMEX Copper rebounded in intraday moves to retest its three week high.



## FUND FLOWS

|             | LATEST  | MTD    | YTD   |
|-------------|---------|--------|-------|
| FII(USD mm) | (135.7) | (43.3) | 7.8   |
| MF(INR cr)  | 864.4   | 739.4  | 601.2 |

## MARKET TURNOVER

|              | LATEST    | AVG MTD | AVG YTD |
|--------------|-----------|---------|---------|
| Cash(INR cr) | 37,623    | 29,566  | 31,902  |
| F&O(INR cr)  | 1,000,521 | 656,553 | 616,085 |

## MARKET VOLATILITY

|          | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 9.4    | 10.4    | 10.9    |
| NSE VIX  | 13.1   | 14.8    | 12.2    |

## NSE INDICES / SECTORAL PERFORMANCE

|        | LATEST | % 1D  | % YTD  |             | LATEST | % 1D    | % YTD    |
|--------|--------|-------|--------|-------------|--------|---------|----------|
| Banks  | 25,595 | 0.6 % | 18.8 % | Energy      | 14,222 | 0.1 %   | 20.3 %   |
| IT     | 11,315 | 0.2 % | 6.8 %  | Pharma      | 9,230  | 1.4 %   | (12.1) % |
| Metals | 3,727  | 1.7 % | 20.0 % | Finance     | 10,478 | 0.6 %   | 18.7 %   |
| Auto   | 11,589 | 1.2 % | 16.8 % | PSU         | 3,823  | 2.3 %   | 8.4 %    |
| FMCG   | 26,454 | 0.1 % | 11.9 % | Real Estate | 316    | (0.5) % | 44.1 %   |

## NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D  | % YTD    | TOP LOSERS | LATEST | % 1D    | % YTD   |
|-------------|--------|-------|----------|------------|--------|---------|---------|
| Punjab Nat  | 179    | 4.2 % | 19.2 %   | Yes Bank   | 311    | (1.5) % | 1.1 %   |
| Vedanta     | 308    | 3.5 % | 13.1 %   | H P C L    | 438    | (1.4) % | 26.6 %  |
| Rural Elec  | 151    | 3.2 % | (15.8) % | Tech Mahin | 494    | (1.3) % | 9.0 %   |
| Hindalco I  | 250    | 2.8 % | 29.0 %   | Coal India | 268    | (1.2) % | (9.3) % |
| Pidilite I  | 886    | 2.7 % | 26.1 %   | UPL        | 710    | (1.1) % | (3.5) % |

## EVENTS CALENDAR

| EVENT   | DATE       | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|---|------------|-----------|--------|--------|----------------|
| RBA Dec. Rate Meeting Minutes                         | 19-12-2017 | 0:30      | AUD    | -      | -              |
| Westpac Leading Index (MoM) (NOV)                     | 19-12-2017 | 23:30     | AUD    | -      | 0.0013         |
| SECO Dec. 2017 Economic Forecasts                     | 19-12-2017 | 6:45      | CHF    | -      | -              |
| Euro-Zone Construction Output s.a. (MoM) (OCT)        | 19-12-2017 | 10:00     | EUR    | -      | 0.001          |
| Euro-Zone Construction Output w.d.a. (YoY) (OCT)      | 19-12-2017 | 10:00     | EUR    | -      | 0.031          |
| Euro-Zone Labour Costs (YoY) (3Q)                     | 19-12-2017 | 10:00     | EUR    | -      | 0.018          |
| German IFO Business Climate (DEC)                     | 19-12-2017 | 9:00      | EUR    | -      | 117.5          |
| German IFO Expectations (DEC)                         | 19-12-2017 | 9:00      | EUR    | -      | 111            |
| BOJ 3Q Money Flow                                     | 19-12-2017 | 23:50     | JPY    | -      | -              |
| Machine Tool Orders (YoY) (NOV F)                     | 19-12-2017 | 6:00      | JPY    | -      | 0.469          |
| ANZ Activity Outlook (DEC)                            | 19-12-2017 | 0:00      | NZD    | -      | 6.5            |
| ANZ Business Confidence (DEC)                         | 19-12-2017 | 0:00      | NZD    | -      | (39.3)         |
| BoP Current Account Balance (3Q)                      | 19-12-2017 | 21:45     | NZD    | -      | -              |
| Current Account Gross Domestic Product Ratio YTD (3Q) | 19-12-2017 | 21:45     | NZD    | -      | (0.028)        |
| Exports (NOV)   | 19-12-2017 | 21:45     | NZD    | -      | -              |
| Imports (NOV)   | 19-12-2017 | 21:45     | NZD    | -      | -              |
| Net Migration s.a. (NOV)                              | 19-12-2017 | 21:45     | NZD    | -      | 5580           |
| Trade Balance (NOV)                                   | 19-12-2017 | 21:45     | NZD    | -      | -              |
| Trade Balance 12 Mth YTD (NOV)                        | 19-12-2017 | 21:45     | NZD    | -      | -              |
| Building Permits (MoM) (NOV)                          | 19-12-2017 | 13:30     | USD    | -      | 0.059          |
| Building Permits (NOV)                                | 19-12-2017 | 13:30     | USD    | -      | -              |
| Current Account Balance (3Q)                          | 19-12-2017 | 13:30     | USD    | -      | -              |
| Housing Starts (MoM) (NOV)                            | 19-12-2017 | 13:30     | USD    | -      | 0.137          |
| Housing Starts (NOV)                                  | 19-12-2017 | 13:30     | USD    | -      | -              |
| U.S. to Sell 4-Week Bills                             | 19-12-2017 | 16:30     | USD    | -      | -              |

..... End of Report .....