



20 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,415	0.4 %	12.7 %
BSE SENSEX	33,775	(0.7) %	13.3 %
CNX BANK	25,059	0.0 %	16.3 %
CNX MIDCAP	19,491	0.0 %	12.4 %
CNX SMALLCAP	8,238	0.0 %	16.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,219	0.1 %	1.6 %
S&P 500	2,732	0.0 %	1.4 %
FTSE 100	7,248	(0.6) %	(5.2) %
HANG SENG	31,115	2.0 %	2.0 %
NIKKEI	22,149	2.0 %	(5.8) %
SHANGHAI COMPOSITE	3,199	0.5 %	(4.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.22	0.5 %	0.9 %
EUR/USD	1.24	(0.8) %	3.3 %
GBP/USD	1.40	(0.6) %	3.8 %
USD/JPY	106.21	0.1 %	(5.8) %
USD/AUD	1.27	0.5 %	(1.1) %
USD/SGD	1.31	0.2 %	(1.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	0.6 %	2.2 %
Gold(INR/10g)	30,635	(0.2) %	4.3 %
Gold Comex(USD/oz)	1,350	(0.7) %	3.2 %
SILVER(INR/1Kg)	38,468	(0.6) %	(0.4) %
Aluminium(USD/MT)	2,190	1.2 %	(2.9) %
Copper(USD/MT)	7,159	0.9 %	(0.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.0) %	0.4 %

Global Economy: Eurozone construction output increased for the second successive month in December, though slightly, data from Eurostat showed Monday. Construction output rose a seasonally adjusted 0.1% month-over-month in December, following a 0.2% rise in November, which was revised down from a 0.5% rise reported earlier. Building activity advanced 0.5% monthly in December, while civil engineering activity declined by 1.1%. On a yearly basis, construction output growth eased sharply to 0.5% in December from 2.9% in the prior month. Japanese exports rose for a 14th straight month in January 2018, helped by continued demand from Asia for equipment to make semiconductors, data from Japan's finance ministry showed. Exports grew 12.2% in January from a year earlier, following a 9.3% year-on-year gain in the previous month.

Global Equities: European shares edged mildly lower amid thin trades. US markets were closed yesterday in observance of Presidents Day.

Indian Economy: FICCI conducted a survey of enterprises post the implementation of GST in the months of November 2017 to January 2018 to have a reality check of various issues being faced by the industry with the transition to GST regime. Both MSME and large corporates have participated in the survey and shared their first-hand experiences with GST implementation in the first six months since its implementation. 59% respondents to the survey comprised of MSME firms whereas the rest 41% were large firms. Besides highlighting the key areas of concerns, the respondents have also made useful suggestions to make GST simpler and effective.

Equity Markets: Trading for the week started on a subdued note as key indices logged modest losses as sentiment was marred by loan fraud cases in the PSU banks. The last week's detection of a massive fraud at a Mumbai branch of the state-run Punjab National Bank (PNB) continued to weigh on sentiment. The latest reports suggesting a loan fraud case in PSU banks by now defunct Rotomac Pens also marred sentiment. The Sensex settled below the psychological 34,000 mark after drifting below that level in early trade. The market dropped for the second day in a row.

Corporate News: Local oil refining and marketing stocks would be in focus following the latest spurt in global crude oil prices. Weak US dollar and supportive economic cues have pushed WTI crude oil futures above \$60 per barrel yet again. Mahindra & Mahindra (M&M) announced that it would make an additional investment at its Chakan plant in Maharashtra. As part of its expansion plans, the company will invest over Rs 500 crore in its electric vehicle (EV) project under the new EV policy of the Government of Maharashtra. The investment for EV and EV components is in addition to its ongoing expansion plan in Chakan which includes an initial investment of Rs 6500 crore. Sun Pharmaceutical Industries (Sun Pharma) said that one of its wholly owned subsidiaries has increased its shareholding in Ranbaxy Malaysia Sdn Bhd, Malaysia, by way of further purchase of 3.86 lakh shares (equivalent to 4.84%) of Ranbaxy Malaysia Sdn Bhd. JSW Energy has entered into memorandum of understanding (MoU) with the Government of Maharashtra for the manufacturing of electric vehicles (EV) and energy storage systems.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(21.0)	(102.3)	9.6
MF(INR cr)	(138.9)	608.7	546.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,574	37,507	33,379
F&O(INR cr)	868,372	887,979	646,169

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.5	24.7	11.6
NSE VIX	16.7	17.2	12.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,059	(0.4) %	16.3 %	Energy	13,778	(0.2) %	16.6 %
IT	12,331	(0.9) %	16.4 %	Pharma	9,028	(1.7) %	(14.0) %
Metals	3,923	(1.7) %	26.3 %	Finance	10,438	(0.3) %	18.3 %
Auto	10,977	(1.2) %	10.6 %	PSU	3,111	(2.5) %	(11.8) %
FMCG	26,411	(0.7) %	11.7 %	Real Estate	323	(1.4) %	47.2 %

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>
Interglobe	1,283	1.4 %	23.0 %	Punjab Nat	117	(7.2) %	(22.3) %
Bharti Inf	330	0.7 %	0.1 %	Tata Steel	649	(5.9) %	40.2 %
Godrej Con	1,038	0.7 %	22.4 %	Bank of Ba	144	(5.6) %	(16.6) %
Coal India	305	0.6 %	3.5 %	Sun TV Net	888	(4.0) %	11.6 %
Reliance I	927	0.6 %	34.9 %	Petronet L	239	(3.6) %	15.5 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA February Meeting Minutes	20-02-2018	0:30	AUD	-	-
Westpac Leading Index (MoM) (JAN)	20-02-2018	23:30	AUD	-	0.003
Wholesale Trade Sales (MoM) (DEC)	20-02-2018	13:30	CAD	-	0.007
Exports (MoM) (JAN)	20-02-2018	7:00	CHF	-	0.028
Imports (MoM) (JAN)	20-02-2018	7:00	CHF	-	0.006
Swiss Watch Exports (YoY) (JAN)	20-02-2018	7:00	CHF	-	0.007
Euro-Zone Consumer Confidence (FEB A)	20-02-2018	15:00	EUR	-	1.3
Euro-Zone ZEW Survey (Economic Sentiment) (FEB)	20-02-2018	10:00	EUR	-	31.8
German Producer Price Index (MoM) (JAN)	20-02-2018	7:00	EUR	-	0.002
German Producer Price Index (YoY) (JAN)	20-02-2018	7:00	EUR	-	0.023
German ZEW Survey Current Situation (FEB)	20-02-2018	10:00	EUR	-	95.2
German ZEW Survey Expectations (FEB)	20-02-2018	10:00	EUR	-	20.4
CBI Trends Selling Prices (FEB)	20-02-2018	11:00	GBP	-	40
CBI Trends Total Orders (FEB)	20-02-2018	11:00	GBP	-	14
Convenience Store Sales (YoY) (JAN)	20-02-2018	7:00	JPY	-	(0.003)
Machine Tool Orders (YoY) (JAN F)	20-02-2018	6:00	JPY	-	0.488
U.S. to Sell USD28 Bln 2-Year Notes	20-02-2018	18:00	USD	-	-
U.S. to Sell USD45 Bln 6-Month Bills	20-02-2018	16:30	USD	-	-
U.S. to Sell USD51 Bln 3-Month Bills	20-02-2018	16:30	USD	-	-
U.S. to Sell USD55 Bln 4-Week Bills	20-02-2018	18:00	USD	-	-

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