



21 Feb.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,365	0.0 %	12.2 %
BSE SENSEX	33,704	(0.2) %	12.8 %
CNX BANK	24,867	(0.0) %	15.4 %
CNX MIDCAP	19,438	(0.2) %	12.1 %
CNX SMALLCAP	8,259	0.1 %	16.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,965	(1.0) %	0.6 %
S&P 500	2,716	(0.6) %	0.8 %
FTSE 100	7,247	(0.0) %	(5.2) %
HANG SENG	30,874	(0.8) %	1.2 %
NIKKEI	21,925	(1.0) %	(6.7) %
SHANGHAI COMPOSITE	3,199	0.5 %	(4.5) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.79	1.4 %	1.8 %
EUR/USD	1.23	(1.4) %	2.7 %
GBP/USD	1.40	(0.8) %	3.6 %
USD/JPY	107.61	1.4 %	(4.5) %
USD/AUD	1.27	0.8 %	(0.8) %
USD/SGD	1.32	0.8 %	(1.3) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	0.4 %	2.5 %
Gold(INR/10g)	30,567	(0.2) %	4.1 %
Gold Comex(USD/oz)	1,330	(1.0) %	1.6 %
SILVER(INR/1Kg)	38,263	(0.5) %	(0.9) %
Aluminium(USD/MT)	2,239	2.3 %	(0.8) %
Copper(USD/MT)	7,027	(1.8) %	(2.1) %

**FIXED INCOME**

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

**Global Economy:** Germany's economic confidence declined less-than-expected in January; survey results from the Mannheim-based think tank ZEW showed Tuesday. The ZEW Indicator of Economic Sentiment dropped to 17.8 points in February from 20.4 in January. Though the score was above the expected level of 16.0, it was below the long-term average of 23.7. The current conditions index fell to 92.3 from 95.2 in the previous month, but it was the second highest reading on record. German producer price inflation slowed to 2.1% in January from 2.3% in December, figures from Destatis revealed. This was the weakest since December 2016, when prices gained 1%. On a monthly basis, producer price growth rose to 0.5% from 0.2% a month ago.

**Global Equities:** The Dow and the S&P 500 close lower for the first the time in six sessions amid mixed sentiments. DOW fell nearly 1%.

**Indian Economy:** Rating agency Ind-Ra said it has revised the outlook on infrastructure sector to stable for the next fiscal on signs of improvement in projects. The infrastructure sector is showing signs of stability, although pockets of stress still linger, India Ratings and Research (Ind-Ra) said in a statement, according to media reports. The agency has revised the outlook on the sector to stable for FY19 from negative in FY18 with visible improvements in toll roads and wind projects. The outlook for telecom has been revised to negative-to-stable from negative. The outlooks for thermal power, oil and gas, power, ports and airports remain unchanged. The rating agency also said it expects its portfolio ratings to remain largely stable during the course of FY19.

**Equity Markets:** Domestic stocks ended the volatile session of trade with small losses amid subdued global stocks. Key indices fell for third straight day with the sentiment taking a hit by the recent detection of a massive fraud at a Mumbai branch of the state-run Punjab National Bank (PNB). Indices trimmed gains after regaining strength in afternoon trade. Stocks traded with steady gains in mid-afternoon trade. Key indices slipped into the negative zone in late trade.

**Corporate News:** Reliance Industries (RIL) and Eros International Media (Eros India) will be in spotlight. RIL and Eros International PLC (Eros) announced on 20 February 2018 that RIL, through a subsidiary, has agreed to subscribe to a 5% equity stake in NYSE listed Eros at a price of \$15 per share, which represents an 18% premium to last closing price. The transaction is subject to customary regulatory and other approvals. Dilip Buildcon said it has been declared as the lowest (L-1) bidder for a new engineering, procurement and construction (EPC) road project valued at Rs 380.07 crore by the National Highways Authority of India (NHAI) in Karnataka. The length of the road project is 52.30 kilometers and the project is expected to be completed in 30 months.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	181.1	(76.5)	10.4
MF(INR cr)	(138.9)	594.7	546.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,577	36,974	33,366
F&O(INR cr)	865,705	886,265	647,162

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.6	24.4	11.7
NSE VIX	16.9	17.2	12.7

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,874	(0.7) %	15.4 %	Energy	13,748	(0.2) %	16.3 %
IT	12,372	0.3 %	16.8 %	Pharma	9,021	(0.1) %	(14.1) %
Metals	3,967	1.1 %	27.7 %	Finance	10,381	(0.5) %	17.6 %
Auto	10,963	(0.1) %	10.5 %	PSU	3,137	0.8 %	(11.0) %
FMCG	26,356	(0.2) %	11.5 %	Real Estate	321	(0.5) %	46.4 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Titan Comp	832	3.5 %	81.2 %	NHPC Ltd	27	(3.4) %	(15.2) %
Vedanta	329	2.6 %	20.5 %	M & M	709	(2.2) %	10.2 %
Sun TV Net	909	2.4 %	14.3 %	Emami	1,045	(1.9) %	(0.4) %
Ambuja Cem	264	2.4 %	11.0 %	Axis Bank	532	(1.6) %	6.2 %
Petronet L	244	2.1 %	17.9 %	Aurobindo	575	(1.4) %	(15.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Construction Work Done (4Q)	21-02-2018	0:30	AUD	-	0.157
Skilled Vacancies (MoM) (JAN)	21-02-2018	0:00	AUD	-	0.002
Wage Price Index (QoQ) (4Q)	21-02-2018	0:30	AUD	-	0.005
Wage Price Index (YoY) (4Q)	21-02-2018	0:30	AUD	-	0.02
Money Supply M3 (YoY) (JAN)	21-02-2018	8:00	CHF	-	0.032
Markit Eurozone Composite PMI (FEB P)	21-02-2018	9:00	EUR	-	58.8
Markit Eurozone Manufacturing PMI (FEB P)	21-02-2018	9:00	EUR	-	59.6
Markit Eurozone Services PMI (FEB P)	21-02-2018	9:00	EUR	-	58
Markit France Composite PMI (FEB P)	21-02-2018	8:00	EUR	-	59.6
Markit France Manufacturing PMI (FEB P)	21-02-2018	8:00	EUR	-	58.4
Markit France Services PMI (FEB P)	21-02-2018	8:00	EUR	-	59.2
Markit Germany Services PMI (FEB P)	21-02-2018	8:30	EUR	-	57.3
Markit/BME Germany Composite PMI (FEB P)	21-02-2018	8:30	EUR	-	59
Markit/BME Germany Manufacturing PMI (FEB P)	21-02-2018	8:30	EUR	-	61.1
Average Weekly Earnings (3M/YoY) (DEC)	21-02-2018	9:30	GBP	-	0.025
BOE's Carney, Broadbent, Haldane and Tenreyro Speak in London	21-02-2018	14:15	GBP	-	-
Central Government NCR (JAN)	21-02-2018	9:30	GBP	-	-
Claimant Count Rate (JAN)	21-02-2018	9:30	GBP	-	0.024
Employment Change 3M/3M (DEC)	21-02-2018	9:30	GBP	-	-
ILO Unemployment Rate 3Mths (DEC)	21-02-2018	9:30	GBP	-	0.043
Jobless Claims Change (JAN)	21-02-2018	9:30	GBP	-	-
PSNB ex Banking Groups (JAN)	21-02-2018	9:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (JAN)	21-02-2018	9:30	GBP	-	-
Public Sector Net Borrowing (JAN)	21-02-2018	9:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (DEC)	21-02-2018	9:30	GBP	-	0.024
All Industry Activity Index (MoM) (DEC)	21-02-2018	4:30	JPY	-	0.01
BOJ Funo speaks for 100 years anniversary of Matsue Branch	21-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 1~3 Years	21-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	21-02-2018	1:10	JPY	-	-



BOJ Outright Bond Purchase 5~10 Year	21-02-2018	1:10	JPY	-	-
Nationwide Department Store Sales (YoY) (JAN)	21-02-2018	5:30	JPY	-	(0.006)
Nikkei Japan PMI Manufacturing (FEB P)	21-02-2018	0:30	JPY	-	54.8
Supermarket Sales (YoY) (JAN)	21-02-2018	5:00	JPY	-	0.009
Tokyo Department Store Sales (YoY) (JAN)	21-02-2018	5:30	JPY	-	0.009
Existing Home Sales (JAN)	21-02-2018	15:00	USD	-	-
Existing Home Sales (MoM) (JAN)	21-02-2018	15:00	USD	-	(0.036)
Fed's Harker Speaks on the Economic Outlook	21-02-2018	14:00	USD	-	-
FOMC Meeting Minutes (31 JAN)	21-02-2018	19:00	USD	-	-
Markit US Composite PMI (FEB P)	21-02-2018	14:45	USD	-	53.8
Markit US Manufacturing PMI (FEB P)	21-02-2018	14:45	USD	-	55.5
Markit US Services PMI (FEB P)	21-02-2018	14:45	USD	-	53.3
MBA Mortgage Applications (16 FEB)	21-02-2018	12:00	USD	-	(0.041)
Revisions: Existing Home Sales	21-02-2018	15:00	USD	-	-
U.S. to Sell USD15 Bln 2-Year Floating Rate Notes Reopening	21-02-2018	16:30	USD	-	-
U.S. to Sell USD35 Bln 5-Year Notes	21-02-2018	18:00	USD	-	-

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