



21 Dec.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,443	(0.0) %	13.0 %
BSE SENSEX	33,777	(0.2) %	12.9 %
CNX BANK	25,556	(0.1) %	18.6 %
CNX MIDCAP	20,676	0.6 %	19.3 %
CNX SMALLCAP	8,797	0.9 %	24.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,727	(0.1) %	24.4 %
S&P 500	2,679	(0.1) %	18.7 %
FTSE 100	7,525	(0.3) %	4.8 %
HANG SENG	29,234	(0.1) %	32.0 %
NIKKEI	22,892	0.1 %	16.8 %
SHANGHAI COMPOSITE	3,288	(0.3) %	4.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.11	0.1 %	(4.9) %
EUR/USD	1.19	1.4	13.3 %
GBP/USD	1.34	(0.3) %	8.7 %
USD/JPY	113.36	0.4 %	(2.3) %
USD/AUD	1.31	0.0 %	(4.6) %
USD/SGD	1.34	(0.2) %	(6.0) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	0.0 %	9.8 %
Gold(INR/10g)	28,607	(0.1) %	2.9 %
Gold Comex(USD/oz)	1,271	0.3 %	9.9 %
SILVER(INR/1Kg)	37,180	0.4 %	(4.5) %
Aluminium(USD/MT)	2,092	1.5 %	22.9 %
Copper(USD/MT)	6,925	1.2 %	24.2 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.5	0.0 %	0.0 %

**Global Economy:** US House of Representatives passed a historic tax bill, which they voted on for the second time due to a technical irregularity the day before. The bill includes a reduction in the corporate tax rate from 35% to 21%. The Senate passed the overhaul early on Wednesday. US housing starts jumped 3.3 percent to an annual rate of 1.297 million in November from a revised 1.256 million in October. After reporting a sharp increase in existing home sales in the U.S. in the previous month, the National Association of Realtors released a report showing another jump in existing home sales in the month of November. NAR said existing home sales soared by 5.6 percent to an annual rate of 5.81 million in November from an upwardly revised 5.50 million in October.

**Global Equities:** US stocks showed a lack of direction over the course of the trading session on Wednesday. The major averages spent much of the day lingering near the unchanged line. The major averages eventually ended the session slightly lower. The Dow dipped 28.10 points or 0.1 percent to 24,726.65, the Nasdaq edged down 2.89 points or less than a tenth of a percent to 6,960.96 and the S&P 500 slipped 2.22 points or 0.1 percent to 2,679.25.

**Indian Economy:** Foreign investment inflows to India rose nearly \$45 billion between April and October, 20 per cent more than what it was in the same period last year with improved outlook on the Indian economy, which is undergoing structural reforms. The rise in dollar inflows amid tightening of monetary policy across major markets including the US and the UK is a positive for India. There may still be a concern for regulators here as 40 per cent of the inflows are short-term. In contrast, it was 24 per cent short-term portfolio investment in the year-ago period, RBI data showed.

**Equity Markets:** The benchmark indices settled with small losses after a range bound and lackluster session of trade as profit booking emerged after market hit record high. Weakness in global stocks weighed on sentiment on the domestic bourses. The barometer index, the S&P BSE Sensex, fell 59.36 points or 0.18% to settle at 33,777.38. The Nifty 50 index dropped 19 points or 0.18% to settle at 10,444.20.

**Corporate News:** HDFC said that it has approved the sale of 6.3% of the equity of Computer Age Management Services to Great Terrain Investment, Mauritius, an affiliate of Warburg Pincus group at a total consideration of Rs 209.05 crore. Post sale, company will continue to hold 4.8% of the equity capital of CAMS. Bank of India said that the Reserve Bank of India has placed the bank under prompt corrective action framework. RIL-owned Reliance Jio Infocomm has emerged the front-runner to acquire the assets of debt-ridden Reliance Communications, as per media reports.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(199.0)	(51.1)	6.7
MF(INR cr)	(884.8)	342.2	577.8

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,854	30,878	31,972
F&O(INR cr)	737,691	654,524	616,377

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.7	10.3	10.9
NSE VIX	12.2	14.4	12.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,592	(0.5) %	18.8 %	Energy	14,263	(0.3) %	20.7 %
IT	11,304	0.6 %	6.7 %	Pharma	9,285	(0.2) %	(11.6) %
Metals	3,806	0.7 %	22.6 %	Finance	10,476	(0.4) %	18.7 %
Auto	11,954	(0.3) %	20.5 %	PSU	3,785	(1.2) %	7.4 %
FMCG	26,730	0.1 %	13.1 %	Real Estate	330	2.9 %	50.7 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
DLF	245	4.8 %	67.0 %	Punjab Nat	171	(4.6) %	13.7 %
Glenmark P	558	3.0 %	(34.9) %	Eicher Mot	30,175	(2.1) %	18.1 %
Tata Motor	238	2.5 %	(15.4) %	Dr Reddy's	2,356	(1.8) %	(14.2) %
JSW Steel	262	2.2 %	38.8 %	Motherson	386	(1.7) %	54.2 %
Emami	1,331	1.9 %	26.8 %	Bharti Air	529	(1.4) %	54.7 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Foreign Exchange Transaction (Australian dollar) (NOV)	21-12-2017	0:30	AUD	-	-
RBA FX Transactions Government (NOV)	21-12-2017	0:30	AUD	-	-
RBA FX Transactions Other (NOV)	21-12-2017	0:30	AUD	-	-
Consumer Price Index (NOV)	21-12-2017	13:30	CAD	-	130.9
Consumer Price Index (YoY) (NOV)	21-12-2017	13:30	CAD	-	0.014
Consumer Price Index Core (YoY) (NOV)	21-12-2017	13:30	CAD	-	0.016
Consumer Price Index n.s.a. (MoM) (NOV)	21-12-2017	13:30	CAD	-	0.001
CPI Core- Median (YoY) (NOV)	21-12-2017	13:30	CAD	-	0.017
CPI Core- Trim (YoY) (NOV)	21-12-2017	13:30	CAD	-	0.015
Retail Sales (MoM) (OCT)	21-12-2017	13:30	CAD	-	0.001
Retail Sales Ex Auto (MoM) (OCT)	21-12-2017	13:30	CAD	-	0.003
Exports (MoM) (NOV)	21-12-2017	7:00	CHF	-	(0.018)
Imports (MoM) (NOV)	21-12-2017	7:00	CHF	-	(0.011)
Money Supply M3 (YoY) (NOV)	21-12-2017	8:00	CHF	-	0.041
Swiss Watch Exports (YoY) (NOV)	21-12-2017	7:00	CHF	-	0.093
Trade Balance (NOV)	21-12-2017	7:00	CHF	-	-
Euro-Zone Consumer Confidence (DEC A)	21-12-2017	15:00	EUR	-	0.1
Central Government NCR (NOV)	21-12-2017	9:30	GBP	-	-
GfK Consumer Confidence (DEC)	21-12-2017	0:01	GBP	-	(12)
PSNB ex Banking Groups (NOV)	21-12-2017	9:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (NOV)	21-12-2017	9:30	GBP	-	-
Public Sector Net Borrowing (NOV)	21-12-2017	9:30	GBP	-	-
BOJ Kuroda speaks at press conference after MPM	21-12-2017	6:30	JPY	-	-
Nationwide Department Store Sales (YoY) (NOV)	21-12-2017	5:30	JPY	-	(0.018)
Tokyo Department Store Sales (YoY) (NOV)	21-12-2017	5:30	JPY	-	(0.003)
Chicago Fed Nat Activity Index (NOV)	21-12-2017	13:30	USD	-	0.65
Continuing Claims (DEC 09)	21-12-2017	13:30	USD	-	-
Core PCE (QoQ) (3Q T)	21-12-2017	13:30	USD	-	0.014
FIA National Consumer Confidence (DEC 15)	21-12-2017	15:30	USD	-	(0)



EIA Working Natural Gas Implied Flow (DEC 15)	21-12-2017	15:30	USD	-	(69)
Gross Domestic Product Annualized (QoQ) (3Q T)	21-12-2017	13:30	USD	-	0.033
Gross Domestic Product Price Index (3Q T)	21-12-2017	13:30	USD	-	0.021
House Price Index (MoM) (OCT)	21-12-2017	14:00	USD	-	0.003
Initial Jobless Claims (DEC 16)	21-12-2017	13:30	USD	-	-
Leading Index (NOV)	21-12-2017	15:00	USD	-	0.012
Personal Consumption (3Q T)	21-12-2017	13:30	USD	-	0.023
Philadelphia Fed Business Outlook (DEC)	21-12-2017	13:30	USD	-	22.7
U.S. to Sell USD14 Bln 5-Year TIPS Reopening	21-12-2017	18:00	USD	-	-

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