



22 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,346	(0.5) %	12.0 %
BSE SENSEX	33,845	0.4 %	12.7 %
CNX BANK	24,836	(0.4) %	15.3 %
CNX MIDCAP	19,364	(0.6) %	11.7 %
CNX SMALLCAP	8,178	(0.6) %	15.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,798	(0.7) %	(0.1) %
S&P 500	2,701	(0.6) %	0.2 %
FTSE 100	7,282	0.5 %	(4.8) %
HANG SENG	31,432	1.8 %	3.0 %
NIKKEI	21,971	0.2 %	(6.5) %
SHANGHAI COMPOSITE	3,199	0.5 %	(4.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.77	0.9 %	1.7 %
EUR/USD	1.23	(1.0) %	2.3 %
GBP/USD	1.39	(0.8) %	2.9 %
USD/JPY	107.26	1.0 %	(4.9) %
USD/AUD	1.28	1.4 %	0.3 %
USD/SGD	1.32	1.0 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	(0.4) %	2.2 %
Gold(INR/10g)	30,398	(0.6) %	3.5 %
Gold Comex(USD/oz)	1,326	(0.2) %	1.3 %
SILVER(INR/1Kg)	38,104	(0.4) %	(1.3) %
Aluminium(USD/MT)	2,190	(2.2) %	(2.9) %
Copper(USD/MT)	7,003	(0.3) %	(2.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.1 %	0.5 %

Global Economy: The Federal Reserve is on track to raise interest rates gradually over the course of the year, according to the minutes of the central bank's most recent meeting. The Fed raised its projection for inflation, noting that core personal consumption expenditure index would rise notably faster this year from its 1.5% rate in December. Eurozone services Purchasing Managers' Index came in at 56.7, down from 58.0 in January and also below the forecast of 57.6, flash data from IHS Markit showed Wednesday. Similarly, the factory PMI slid to 58.5 from 59.6 in the previous month. The composite output index dropped to 57.5 from 58.8 in the previous month. Private sector growth continued to rise at a steep pace in February, albeit with the rate of expansion cooling from the near 12-year high in January. Germany's private sector expanded strongly in February, although the pace of growth slowed from a near seven-year high seen in January, flash data from IHS Markit showed. The composite output index dropped unexpectedly to a 3-month low of 57.4 in February from 59 in January. France's private sector expanded at the slowest pace in four months in February. The composite output index fell to 57.8 in February from 59.6 in January.

Global Equities: US stocks took a tumble, extending losses after the Fed minutes. Sentiments were mixed in Europe while markets moved up in Asia.

Indian Economy: The Prime Minister, Narendra Modi said the Government is taking a series of coordinated steps to improve the income of farmers. In this regard, he mentioned four aspects: reducing input costs; ensuring a fair price for the produce; reducing wastage; and creating alternate sources of income. The Prime Minister said that 100% neem coating of urea has led to an increased efficiency of the urea itself, while also increasing productivity. He said that a study indicates that the use of soil health cards has led to a reduction in the use of chemical fertilisers, while increasing production.

Equity Markets: Key benchmark indices logged modest gains yesterday as bargain hunting helped indices stage a comeback after prior three-day fall. IT stocks gained after Nasscom reportedly issued a cautiously optimistic outlook for the Indian IT sector. Trading for the day began on a positive note as domestic stocks logged modest gains in early trade. Stocks traded with modest gains in afternoon and mid-afternoon trade. The market extended gains in late trade.

Corporate News: Lupin announced the launch of its Memantine Hydrochloride Extended-Release Capsules, 7mg, 14mg, 21mg, 28mg having received an approval from the United States Food and Drug Administration (USFDA) earlier. Domestic Crude oil production during January, 2018 was 2976.41 TMT which is 5.88% lower than target and 3.22% lower when compared with January 2017. Cumulative crude oil production during April-January, 2017-18 was 29910.80 TMT which is 4.48% lower than target for the period and 0.7% lower than production during corresponding period of last year. Foreign direct investment (FDI) in the country rose by 0.27% to \$35.94 billion during the first 9 months of the current fiscal, according to the DIPP data. The FDI inflows were \$35.84 billion during the April-December period of last fiscal, 2016-17.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(112.9)	(79.5)	9.9
MF(INR cr)	(138.9)	594.7	546.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,087	36,625	33,360
F&O(INR cr)	927,430	889,206	648,425

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.6	24.4	11.7
NSE VIX	15.9	17.1	12.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,937	0.3 %	15.7 %	Energy	13,819	0.5 %	16.9 %
IT	12,660	2.3 %	19.5 %	Pharma	8,843	(2.0) %	(15.8) %
Metals	3,912	(1.4) %	26.0 %	Finance	10,406	0.2 %	17.9 %
Auto	10,942	(0.2) %	10.3 %	PSU	3,171	1.1 %	(10.1) %
FMCG	26,572	0.8 %	12.4 %	Real Estate	319	(0.7) %	45.4 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Avenue Sup	1,238	4.3 %	95.2 %	Sun Pharma	526	(6.0) %	(24.1) %
HCL Techno	943	3.9 %	8.8 %	Oil India	343	(5.3) %	3.9 %
Tech Mahin	595	3.7 %	31.4 %	Motherson	314	(3.6) %	25.5 %
TCS	3,042	3.3 %	26.1 %	Hindalco I	241	(3.3) %	24.3 %
Sun TV Net	933	2.6 %	17.3 %	S A I L	84	(2.7) %	33.4 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (DEC)	22-02-2018	13:30	CAD	-	0.002
Retail Sales Ex Auto (MoM) (DEC)	22-02-2018	13:30	CAD	-	0.016
Industrial Output w.d.a. (YoY) (4Q)	22-02-2018	8:15	CHF	-	0.086
Industry & Construction Output WDA (YoY) (4Q)	22-02-2018	8:15	CHF	-	0.074
ECB Publishes Account of Jan. 24-25 Policy meeting	22-02-2018	12:30	EUR	-	-
German IFO Business Climate (FEB)	22-02-2018	9:00	EUR	-	117.6
German IFO Current Assessment (FEB)	22-02-2018	9:00	EUR	-	127.7
German IFO Expectations (FEB)	22-02-2018	9:00	EUR	-	108.4
CBI Reported Sales (FEB)	22-02-2018	11:00	GBP	-	12
CBI Total Dist. Reported Sales (FEB)	22-02-2018	11:00	GBP	-	14
Exports (4Q P)	22-02-2018	9:30	GBP	-	(0.007)
Government Spending (4Q P)	22-02-2018	9:30	GBP	-	0.003
Gross Domestic Product (QoQ) (4Q P)	22-02-2018	9:30	GBP	-	0.005
Gross Domestic Product (YoY) (4Q P)	22-02-2018	9:30	GBP	-	0.015
Gross Fixed Capital Formation (4Q P)	22-02-2018	9:30	GBP	-	0.002
Imports (4Q P)	22-02-2018	9:30	GBP	-	0.011
Index of Services (3Mo3M) (DEC)	22-02-2018	9:30	GBP	-	0.004
Index of Services (MoM) (DEC)	22-02-2018	9:30	GBP	-	0.004
Private Consumption (4Q P)	22-02-2018	9:30	GBP	-	0.006
Total Business Investment (QoQ) (4Q P)	22-02-2018	9:30	GBP	-	0.005
Total Business Investment (YoY) (4Q P)	22-02-2018	9:30	GBP	-	0.017
Corporate Service Price (YoY) (JAN)	22-02-2018	23:50	JPY	-	0.008
National Consumer Price Index (YoY) (JAN)	22-02-2018	23:30	JPY	-	0.01
National Consumer Price Index Ex-Fresh Food (YoY) (JAN)	22-02-2018	23:30	JPY	-	0.009
Natl CPI Ex Fresh Food, Energy (YoY) (JAN)	22-02-2018	23:30	JPY	-	0.003
Credit Card Spending (MoM) (JAN)	22-02-2018	2:00	NZD	-	0.006
Credit Card Spending (YoY) (JAN)	22-02-2018	2:00	NZD	-	0.063
Retail Sales Ex Inflation (QoQ) (4Q)	22-02-2018	21:45	NZD	-	0.002
Continuing Claims (4Q FEB)	22-02-2018	12:30	USD	-	-



DOE Cushing OK Crude Inventory (16 FEB)	22-02-2018	16:00	USD	-	-
DOE U.S. Crude Oil Inventories (16 FEB)	22-02-2018	16:00	USD	-	-
DOE U.S. Distillate Inventory (16 FEB)	22-02-2018	16:00	USD	-	-
DOE U.S. Gasoline Inventories (16 FEB)	22-02-2018	16:00	USD	-	-
EIA Natural Gas Storage Change (16 FEB)	22-02-2018	15:30	USD	-	(194)
EIA Working Natural Gas Implied Flow (16 FEB)	22-02-2018	15:30	USD	-	(194)
Fed's Bostic Speaks at Banking Conference in Atlanta	22-02-2018	17:10	USD	-	-
Fed's Dudley to Speak at New York Fed Briefing on Puerto Rico	22-02-2018	15:00	USD	-	-
Fed's Kaplan Speaks on Trade Panel in Vancouver	22-02-2018	20:30	USD	-	-
Fed's Quarles to Speak on Global Economy	22-02-2018	5:15	USD	-	-
Initial Jobless Claims (17 FEB)	22-02-2018	13:30	USD	-	-
Kansas City Fed Manf. Activity (FEB)	22-02-2018	16:00	USD	-	16
Leading Index (JAN)	22-02-2018	15:00	USD	-	0.006
U.S. to Sell USD29 Bln 7-Year Notes	22-02-2018	18:00	USD	-	-

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