



22 Dec.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,458	0.2 %	13.2 %
BSE SENSEX	33,756	(0.1) %	13.1 %
CNX BANK	25,564	0.0 %	18.6 %
CNX MIDCAP	20,846	0.4 %	20.3 %
CNX SMALLCAP	8,902	0.6 %	25.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,782	0.2 %	24.6 %
S&P 500	2,685	0.2 %	18.9 %
FTSE 100	7,604	1.1 %	5.9 %
HANG SENG	29,367	0.5 %	32.6 %
NIKKEI	22,866	(0.1) %	16.7 %
SHANGHAI COMPOSITE	3,300	0.4 %	5.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.06	(0.1) %	(5.0) %
EUR/USD	1.18	(0.2) %	11.8 %
GBP/USD	1.34	0.1 %	8.8 %
USD/JPY	113.28	(0.1) %	(2.3) %
USD/AUD	1.30	(0.7) %	(5.3) %
USD/SGD	1.34	(0.0) %	(6.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	1.6 %	11.5 %
Gold(INR/10g)	28,676	0.2 %	3.1 %
Gold Comex(USD/oz)	1,270	(0.1) %	9.7 %
SILVER(INR/1Kg)	37,098	(0.2) %	(4.7) %
Aluminium(USD/MT)	2,109	0.8 %	23.9 %
Copper(USD/MT)	6,977	0.8 %	25.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	0.1	(2.4) %	(2.4) %

Global Economy: Economic activity in the US grew at a slightly slower than previously estimated rate in the third quarter, according to a report released by the Commerce Department on Thursday. The GDP rose by 3.2% in the third quarter compared to the previously estimated 3.3% increase. The Conference Board said its leading economic index edged up by 0.4% in November after jumping by 1.2% in October. The coincident economic index rose by 0.3% in November, matching the increase seen in October. The lagging economic index rose by 0.1% in November following a 0.3% increase in the previous month. The Bank of Japan maintained its aggressive monetary easing, as inflation remains well below the 2% target. Governor Haruhiko Kuroda and his board members decided by an 8-1 majority vote to hold its target of raising the amount of outstanding JGB holdings at an annual pace of about JPY 80 trillion.

Global Equities: US stocks edged up but the trading was thin ahead of the holiday season. Energy stocks saw strength following sustained gains in crude oil prices.

Indian Economy: Indian pharmaceutical exports are likely to touch \$20 billion by 2020 from the current level of around \$16.5 billion, registering a compounded annual growth rate (CAGR) of about 30 per cent, reveals ASSOCHAM and UL India joint study. Indian pharmaceutical sector is expected to register a growth of about 16% in 2018 and is likely to touch \$55 billion by 2020 from the current level of \$28 billion, reveals joint study. Most of the exports, says the ASSOCHAM Secretary General, D.S. Rawat shall be derived from generic drugs.

Equity Markets: Local indices settled marginally lower after a range bound trade amid subdued global cues. Key indices dropped for the second straight day. The market opened higher and swung between gains and losses around the flat line in a narrow range in a lackluster session of trade. The breadth, indicating the overall health of the market, was strong. On the BSE, 1,705 shares rose and 1,009 shares fell. A total of 181 shares were unchanged.

Corporate News: HDFC announced that it has entered into definitive agreements to transfer its entire shareholding in HDFC Realty, a real estate brokerage platform; and, HDFC Developers (which runs the HDFC RED platform) to Quikr, India's market leader in digital classified business. HDFC has also acquired an equity stake in Quikr India. The announcement was made after market hours yesterday, 21 December 2017. Canara Bank said it proposes to offload 4% stake in Canfin Homes (CFHL) through empanelled merchant bankers/ investment bankers. The post deal stake holding by Canara Bank in CFHL will be 26%. The announcement was made after market hours yesterday, 21 December 2017. Dalmia Bharat said creditors approved its resolution plan for Murli Industries. Dalmia Bharat announced that the Committee of Creditors (CoC) of Murli Industries (MIL), constituted in accordance with the provisions of the Insolvency and Bankruptcy Code 2016 on 20 December 2017 approved the proposed Resolution Plan (RP) submitted by subsidiary, Dalmia Cement (Bharat) (DCBL), for recommendation to National Company Law Tribunal, Mumbai for its approval in relation to revival of MIL.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(225.8)	(64.5)	5.4
MF(INR cr)	(884.8)	342.2	577.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,666	31,434	32,009
F&O(INR cr)	988,370	676,780	618,432

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.6	10.2	10.9
NSE VIX	12.1	14.3	12.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,554	(0.1) %	18.6 %	Energy	14,251	(0.1) %	20.6 %
IT	11,374	0.6 %	7.4 %	Pharma	9,322	0.4 %	(11.3) %
Metals	3,840	0.9 %	23.6 %	Finance	10,472	(0.0) %	18.6 %
Auto	11,877	(0.6) %	19.7 %	PSU	3,790	0.1 %	7.5 %
FMCG	26,668	(0.2) %	12.8 %	Real Estate	333	0.8 %	51.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun TV Net	983	5.0 %	23.6 %	M & M	742	(3.7) %	15.4 %
Siemens	1,243	4.2 %	(4.5) %	Motherson	375	(2.9) %	49.7 %
NHPC Ltd	30	4.1 %	(8.5) %	Interglobe	1,139	(2.3) %	9.2 %
Pidilite I	924	3.9 %	31.5 %	Havells In	549	(1.7) %	17.1 %
Idea Cellu	102	3.8 %	19.3 %	Shree Ceme	17,551	(1.4) %	2.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Gross Domestic Product (MoM) (OCT)	22-12-2017	13:30	CAD	-	0.002
Gross Domestic Product (YoY) (OCT)	22-12-2017	13:30	CAD	-	0.033
KOF Leading Indicator (DEC)	22-12-2017	8:00	CHF	-	110.3
French Gross Domestic Product (QoQ) (3Q F)	22-12-2017	7:45	EUR	-	0.005
French Gross Domestic Product (YoY) (3Q F)	22-12-2017	7:45	EUR	-	0.022
German GfK Consumer Confidence (JAN)	22-12-2017	7:00	EUR	-	10.7
Current Account Balance (3Q)	22-12-2017	9:30	GBP	-	-
Gross Domestic Product (QoQ) (3Q F)	22-12-2017	9:30	GBP	-	0.004
Gross Domestic Product (YoY) (3Q F)	22-12-2017	9:30	GBP	-	0.015
Index of Services (3Mo3M) (OCT)	22-12-2017	9:30	GBP	-	0.004
Index of Services (MoM) (OCT)	22-12-2017	9:30	GBP	-	0.001
Lloyds Business Barometer (DEC)	22-12-2017	0:01	GBP	-	24
Total Business Investment (QoQ) (3Q F)	22-12-2017	9:30	GBP	-	0.002
Total Business Investment (YoY) (3Q F)	22-12-2017	9:30	GBP	-	0.013
Unemployment Rate NSA (NOV)	22-12-2017	14:00	MXN	-	-
Unemployment Rate SA (NOV)	22-12-2017	14:00	MXN	-	-
Baker Hughes U.S. Rig Count (DEC 22)	22-12-2017	18:00	USD	-	930
Cap Goods Orders Nondef Ex Air (NOV P)	22-12-2017	13:30	USD	-	0.003
Cap Goods Ship Nondef Ex Air (NOV P)	22-12-2017	13:30	USD	-	0.011
Durable Goods Orders (NOV P)	22-12-2017	13:30	USD	-	(0.008)
Durables Ex Transportation (NOV P)	22-12-2017	13:30	USD	-	0.009
Kansas City Fed Manf. Activity (DEC)	22-12-2017	16:00	USD	-	16
New Home Sales (MoM) (NOV)	22-12-2017	15:00	USD	-	0.062
New Home Sales (NOV)	22-12-2017	15:00	USD	-	-
PCE Core (MoM) (NOV)	22-12-2017	13:30	USD	-	0.002
PCE Core (YoY) (NOV)	22-12-2017	13:30	USD	-	0.014
PCE Deflator (MoM) (NOV)	22-12-2017	13:30	USD	-	0.001
Personal Consumption Expenditure Deflator (YoY) (NOV)	22-12-2017	13:30	USD	-	0.016
Personal Income (NOV)	22-12-2017	13:30	USD	-	0.004



Personal Spending (NOV)	22-12-2017	13:30	USD	-	0.003
Real Personal Spending (NOV)	22-12-2017	13:30	USD	-	0.001
U. of Mich. 1 Yr Inflation (DEC F)	22-12-2017	15:00	USD	-	0.028
U. of Mich. 5-10 Yr Inflation (DEC F)	22-12-2017	15:00	USD	-	0.025
U. of Mich. Current Conditions (DEC F)	22-12-2017	15:00	USD	-	115.9
U. of Mich. Expectations (DEC F)	22-12-2017	15:00	USD	-	84.6
U. of Mich. Sentiment (DEC F)	22-12-2017	15:00	USD	-	96.8

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