



23 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,383	0.0 %	12.4 %
BSE SENSEX	33,820	(0.1) %	13.1 %
CNX BANK	24,955	0.0 %	15.8 %
CNX MIDCAP	19,375	0.0 %	11.8 %
CNX SMALLCAP	8,186	0.0 %	15.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,962	0.7 %	0.6 %
S&P 500	2,704	0.1 %	0.3 %
FTSE 100	7,252	(0.4) %	(5.2) %
HANG SENG	30,966	(1.5) %	1.5 %
NIKKEI	21,736	(1.1) %	(7.5) %
SHANGHAI COMPOSITE	3,269	2.2 %	(2.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.05	0.4 %	2.2 %
EUR/USD	1.23	(0.2) %	2.6 %
GBP/USD	1.40	(0.3) %	3.2 %
USD/JPY	106.89	(0.7) %	(5.2) %
USD/AUD	1.28	0.6 %	(0.2) %
USD/SGD	1.32	0.1 %	(1.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	(0.4) %	2.2 %
Gold(INR/10g)	30,384	(0.0) %	3.5 %
Gold Comex(USD/oz)	1,326	(0.2) %	1.3 %
SILVER(INR/1Kg)	38,315	0.6 %	(0.7) %
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 Conference Board released a report on Thursday showing a bigger than expected increase by its index of leading US economic indicators in the month of January. The Conference Board said its leading economic index jumped by 1%. The UK economy grew less than estimated in the fourth quarter, partly following revision to production output, the second estimate from the Office for National Statistics showed Thursday. Gross domestic product (GDP) grew by 0.4% sequentially instead of 0.5% estimated initially. GDP rose 0.5% in the third quarter. In 2017, the economy grew 1.7%, which was also slower than the previous estimate of 1.8%. The dominant-services sector grew 0.6% while production output rose 0.5% in last quarter. Germany's business confidence weakened in February, survey data from Ifo institute revealed. The business sentiment index fell more-than-expected to 115.4 from 117.6 in January.

Global Equities: US stocks edged up amid steady data and good buying support. European stocks witnessed some selling pressure as the latest Federal Reserve meeting minutes rekindled fears of inflation and higher interest rates.

Indian Economy: The Union Minister of Agriculture and farmers' Welfare Radha Mohan Singh stated that the entire country is dependent on the Eastern region for food security. The Gangetic plains, being extremely fertile, are able to ensure food security of the entire country. The Eastern Plateau can play an important role in increasing yield in fruits and vegetables. He further said that in the current scenario, the Eastern region leads in the production of rice, vegetables and freshwater fish and ensures 50%, 45% and 38% production in rice, vegetable and fish at the national level respectively.

Equity Markets: Key benchmark indices settled with small losses in a volatile session of trade as weakness in global stocks weighed on sentiment. After opening with downward gap triggered by negative Asian cues, domestic stocks staged a short-lived recovery in mid-afternoon trade. The recovery was derailed soon. However, stocks once staged a comeback and managed to cut most of intraday losses in late trade. Overall day was volatile owing to the F&O expiry.

Corporate News: Tractor sales in India will hit a record in the current fiscal but moderate in 2018-19, according to a report by India Ratings and Research (Ind-Ra), stated media reports. The industry has already recorded strong volume growth of 16.6 per cent with total domestic volumes sales of 6,59,170 tractors in the April-January period of 2017-18, the credit rating agency said. Adani Transmission said it has received the letter of intent (LoI) from PFC Consulting, a wholly owned subsidiary of Power Finance Corporation, to construct, own, operate and maintain the transmission project in Rajasthan. Dilip Buildcon has received letter of award from Ircon International, a Government of India undertaking for a new engineering, procurement and construction (EPC) project valued at Rs 157.23 crore in Karnataka. The expected completion period of the 6.85 kilometers road project is 24 months.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(188.3)	(87.9)	9.0
MF(INR cr)	(138.9)	594.7	546.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,480	36,882	33,392
F&O(INR cr)	1,403,991	923,525	651,813

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.0	24.1	11.7
NSE VIX	14.8	16.9	12.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,955	0.1 %	15.8 %	Energy	13,667	(1.1) %	15.6 %
IT	12,730	0.6 %	20.2 %	Pharma	8,862	0.2 %	(15.6) %
Metals	3,904	(0.2) %	25.7 %	Finance	10,397	(0.1) %	17.8 %
Auto	10,848	(0.9) %	9.3 %	PSU	3,155	(0.5) %	(10.5) %
FMCG	26,461	(0.4) %	11.9 %	Real Estate	320	0.3 %	45.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
GlaxoSmith	6,765	4.4 %	30.5 %	B P C L	427	(4.5) %	0.4 %
Sun Pharma	541	3.0 %	(21.8) %	Siemens	1,193	(4.1) %	(8.4) %
Shriram Tr	1,298	2.9 %	17.6 %	Colgate-Pa	1,042	(3.6) %	3.5 %
Aurobindo	587	2.8 %	(14.1) %	Cummins In	817	(3.1) %	(15.0) %
Adani Port	404	2.1 %	18.1 %	Bharat Ele	147	(2.9) %	0.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (JAN)	23-02-2018	13:30	CAD	-	130.8
Consumer Price Index (YoY) (JAN)	23-02-2018	13:30	CAD	-	0.019
Consumer Price Index Core (YoY) (JAN)	23-02-2018	13:30	CAD	-	0.016
Consumer Price Index n.s.a. (MoM) (JAN)	23-02-2018	13:30	CAD	-	(0.004)
CPI Core - Median (YoY) (JAN)	23-02-2018	13:30	CAD	-	0.019
CPI Core - Trim (YoY) (JAN)	23-02-2018	13:30	CAD	-	0.019
ECB's Coeure, Fed's Mester Participate in Panel in New York	23-02-2018	18:30	EUR	-	-
Euro-Zone Consumer Price Index (MoM) (JAN)	23-02-2018	10:00	EUR	-	0.004
Euro-Zone Consumer Price Index (YoY) (JAN F)	23-02-2018	10:00	EUR	-	0.014
Euro-Zone Consumer Price Index Core (YoY) (JAN F)	23-02-2018	10:00	EUR	-	0.01
German Capital Investment (4Q)	23-02-2018	7:00	EUR	-	0.004
German Construction Investment (4Q)	23-02-2018	7:00	EUR	-	(0.004)
German Domestic Demand (4Q)	23-02-2018	7:00	EUR	-	0.004
German Exports (4Q)	23-02-2018	7:00	EUR	-	0.017
German Government Spending (4Q)	23-02-2018	7:00	EUR	-	0
German Gross Domestic Product n.s.a. (YoY) (4Q F)	23-02-2018	7:00	EUR	-	0.023
German Gross Domestic Product s.a. (QoQ) (4Q F)	23-02-2018	7:00	EUR	-	0.006
German Gross Domestic Product w.d.a. (YoY) (4Q F)	23-02-2018	7:00	EUR	-	0.029
German Imports (4Q)	23-02-2018	7:00	EUR	-	0.009
German Private Consumption (4Q)	23-02-2018	7:00	EUR	-	(0.001)
BOE's Ramsden Speaks on Productivity in Cambridge	23-02-2018	12:00	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	23-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	23-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	23-02-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	23-02-2018	1:10	JPY	-	-
Baker Hughes U.S. Rig Count (23 FEB)	23-02-2018	18:00	USD	-	975
Fed Releases February 2018 Monetary Policy Report to Congress	23-02-2018	16:00	USD	-	-
Fed's Dudley and Rosengren Speak on Panel on Fed Balance Sheet	23-02-2018	15:15	USD	-	-
Fed's Williams Speaks on Outlook for U.S. Economy	23-02-2018	20:40	USD	-	-



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