



24 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,084	1.1 %	20.0 %
BSE SENSEX	36,140	1.0 %	20.8 %
CNX BANK	27,391	1.3 %	27.1 %
CNX MIDCAP	21,732	1.0 %	25.4 %
CNX SMALLCAP	9,389	0.3 %	32.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,211	(0.0) %	5.6 %
S&P 500	2,839	0.2 %	5.3 %
FTSE 100	7,732	0.2 %	1.1 %
HANG SENG	32,931	1.7 %	7.9 %
NIKKEI	24,124	1.3 %	2.6 %
SHANGHAI COMPOSITE	3,547	1.3 %	5.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.87	0.0 %	0.3 %
EUR/USD	1.23	0.3 %	2.0 %
GBP/USD	1.40	0.9 %	3.5 %
USD/JPY	110.94	0.2 %	(1.6) %
USD/AUD	1.25	0.0 %	(2.2) %
USD/SGD	1.32	(0.1) %	(1.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	0.2 %	5.2 %
Gold(INR/10g)	29,968	(0.4) %	2.1 %
Gold Comex(USD/oz)	1,336	0.3 %	2.1 %
SILVER(INR/1Kg)	38,714	0.2 %	0.3 %
Aluminium(USD/MT)	2,235	(0.9) %	(0.9) %
Copper(USD/MT)	7,049	(0.4) %	(1.8) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	(0.0) %	0.2 %

Global Economy: Germany's economic confidence improved to an eight-month high and the assessment of current situation hit a record in January, indicating an optimistic outlook for the economy in the first half of the year. The ZEW Indicator of Economic Sentiment rose three points to 20.4 in January, survey results from the Mannheim-based think tank ZEW showed Tuesday. Nonetheless, the score was below its long-term average of 23.7. The assessment of the current economic situation increased in January, with the corresponding index climbing 5.9 points to 95.2 points. Japan's central bank kept monetary settings unchanged and offered a more upbeat view on inflation expectations than three months ago. The Bank of Japan (BOJ) maintained a pledge to guide short-term interest rates at minus 0.1% and 10-year bond yields around zero percent at its two-day rate review. It also kept intact a loose pledge to buy government bonds so its holdings increase roughly at an annual pace of 80 trillion yen (\$722 billion). The nine-member board also kept its price forecasts that project inflation to hit 2% around the fiscal year ending in March 2020.

Global Equities: European shares gained, following strong gains seen in Asia. Asian shares gained following the stronger lead from Wall Street after US lawmakers reached a deal to end a government shutdown.

Indian Economy: Domestic air passengers crossed 100 million for the first time in 2017 shows passenger data released by the Directorate General of Civil Aviation (DGCA). Data shows that airlines carried 117 million passengers during 2017, a growth of 17.31% over 2016. During the month of December, domestic air passengers grew by about 17.69% with Indian carriers carrying 11.2 million during the month.

Equity Markets: Euphoria on the Dalal street seemed to be never ending as key benchmark indices extended recent gains to hit fresh record high levels. International Monetary Fund (IMF) report showing India is set to regain the title as the world's fastest growing major economy in 2018-2019 and bright outlook for global economy boosted sentiment. Positive global cues also underpinned investors sentiment. Key indices crossed new milestones, with the Sensex mounting 36,000 mark and the Nifty settling above the 11,000-mark for the first time in history. The market gained for the fifth straight day.

Corporate News: Welspun Corp plans to raise Rs. 250 crore through issuance of non-convertible debentures (NCDs) on a private placement basis. Sasken Technologies surged 5.84% after consolidated net profit rose 8.52% to Rs 20.37 crore on 5.63% growth in net sales to Rs 131.87 crore in Q3 December 2017 over Q2 September 2017. Bharti Airtel's rating headroom will narrow due to lower cash generation and high capex requirements in the financial year ending March 2018 (FY18), noted Fitch Ratings. However, some of the pressure on Bharti and other incumbent Indian telcos should begin to fade this year, as the intense competition sparked by Reliance Jio's 2016 market entry begins to ease.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	241.6	77.2	11.5
MF(INR cr)	168.0	294.1	555.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	49,292	40,077	32,854
F&O(INR cr)	998,933	710,099	628,391

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.0	10.3	10.8
NSE VIX	16.2	14.0	12.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,391	1.3 %	27.1 %	Energy	14,597	1.3 %	23.5 %
IT	13,049	1.2 %	23.2 %	Pharma	9,767	1.2 %	(7.0) %
Metals	4,169	4.1 %	34.2 %	Finance	11,195	0.9 %	26.8 %
Auto	11,726	0.3 %	18.2 %	PSU	3,832	4.0 %	8.7 %
FMCG	27,761	0.6 %	17.4 %	Real Estate	356	0.7 %	62.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Havells In	584	5.7 %	24.6 %	Ambuja Cem	263	(2.1) %	10.6 %
Punjab Nat	186	5.6 %	23.9 %	Eicher Mot	27,071	(2.1) %	6.0 %
JSW Steel	294	5.5 %	55.7 %	ACC	1,790	(2.0) %	22.4 %
Bank of Ba	173	5.1 %	0.4 %	Wipro	315	(2.0) %	24.3 %
Vedanta	344	5.1 %	26.0 %	Zee Entert	597	(1.9) %	13.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (DEC)	24-01-2018	0:00	AUD	-	0.003
China Economic Adviser Liu He Speaks in Davos	24-01-2018	9:50	CNY	-	-
Markit Eurozone Composite PMI (JAN P)	24-01-2018	9:00	EUR	-	58.1
Markit Eurozone Manufacturing PMI (JAN P)	24-01-2018	9:00	EUR	-	60.6
Markit Eurozone Services PMI (JAN P)	24-01-2018	9:00	EUR	-	56.6
Markit France Composite PMI (JAN P)	24-01-2018	8:00	EUR	-	59.6
Markit France Manufacturing PMI (JAN P)	24-01-2018	8:00	EUR	-	58.8
Markit France Services PMI (JAN P)	24-01-2018	8:00	EUR	-	59.1
Markit Germany Services PMI (JAN P)	24-01-2018	8:30	EUR	-	55.8
Markit/BME Germany Composite PMI (JAN P)	24-01-2018	8:30	EUR	-	58.9
Markit/BME Germany Manufacturing PMI (JAN P)	24-01-2018	8:30	EUR	-	63.3
Average Weekly Earnings (3M/YoY) (NOV)	24-01-2018	9:30	GBP	-	0.025
Claimant Count Rate (DEC)	24-01-2018	9:30	GBP	-	0.023
Employment Change 3M/3M (NOV)	24-01-2018	9:30	GBP	-	-
ILO Unemployment Rate 3Mths (NOV)	24-01-2018	9:30	GBP	-	0.043
Jobless Claims Change (DEC)	24-01-2018	9:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (NOV)	24-01-2018	9:30	GBP	-	0.023
BOJ Outright Bond Purchase 1~3 Years	24-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	24-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	24-01-2018	1:10	JPY	-	-
Coincident Index (NOV F)	24-01-2018	5:00	JPY	-	118.1
Foreign Buying Japan Bonds (JAN 19)	24-01-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JAN 19)	24-01-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JAN 19)	24-01-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JAN 19)	24-01-2018	23:50	JPY	-	-
Leading Index CI (NOV F)	24-01-2018	5:00	JPY	-	108.6
Nikkei Japan PMI Manufacturing (JAN P)	24-01-2018	0:30	JPY	-	54
Consumer Price Index (QoQ) (4Q)	24-01-2018	21:45	NZD	-	0.005
Consumer Price Index (MoM) (4Q)	24-01-2018	21:45	NZD	-	0.010



Credit Card Spending (MoM) (DEC)	24-01-2018	2:00	NZD	-	0.008
Credit Card Spending (YoY) (DEC)	24-01-2018	2:00	NZD	-	0.091
DOE Cushing OK Crude Inventory (JAN 19)	24-01-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 19)	24-01-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (JAN 19)	24-01-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (JAN 19)	24-01-2018	15:30	USD	-	-
Existing Home Sales (DEC)	24-01-2018	15:00	USD	-	-
Existing Home Sales (MoM) (DEC)	24-01-2018	15:00	USD	-	0.056
House Price Index (MoM) (NOV)	24-01-2018	14:00	USD	-	0.005
Markit US Composite PMI (JAN P)	24-01-2018	14:45	USD	-	54.1
Markit US Manufacturing PMI (JAN P)	24-01-2018	14:45	USD	-	55.1
Markit US Services PMI (JAN P)	24-01-2018	14:45	USD	-	53.7
MBA Mortgage Applications (JAN 19)	24-01-2018	12:00	USD	-	0.041
U.S. to Sell USD15 Bln 2-Year Floating Rate Notes	24-01-2018	16:30	USD	-	-
U.S. to Sell USD34 Bln 5-Year Notes	24-01-2018	18:00	USD	-	-

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