



25 Jan.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,086	0.0 %	20.0 %
BSE SENSEX	36,162	0.1 %	20.9 %
CNX BANK	27,399	0.0 %	27.2 %
CNX MIDCAP	21,637	(0.4) %	24.8 %
CNX SMALLCAP	9,313	(0.8) %	31.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,252	0.2 %	5.8 %
S&P 500	2,838	(0.1) %	5.3 %
FTSE 100	7,643	(1.1) %	(0.1) %
HANG SENG	32,959	0.1 %	8.0 %
NIKKEI	23,941	(0.8) %	1.8 %
SHANGHAI COMPOSITE	3,559	0.4 %	6.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	63.78	(0.1) %	0.2 %
EUR/USD	1.23	0.5 %	2.5 %
GBP/USD	1.40	0.4 %	3.8 %
USD/JPY	110.02	(0.8) %	(2.4) %
USD/AUD	1.25	(0.1) %	(2.3) %
USD/SGD	1.32	(0.2) %	(1.4) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	1.5 %	6.8 %
Gold(INR/10g)	30,161	0.6 %	2.7 %
Gold Comex(USD/oz)	1,346	0.7 %	2.8 %
SILVER(INR/1Kg)	38,714	0.2 %	0.3 %
Aluminium(USD/MT)	2,214	(1.0) %	(1.9) %
Copper(USD/MT)	6,905	(2.0) %	(3.8) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	(0.0) %	0.2 %

**Global Economy:** Eurozone composite output index rose unexpectedly to 58.6 in January from 58.1 in December, flash data from IHS Markit showed Wednesday. The expected reading was 57.9. This was the highest since June 2006. An acceleration of service sector growth to the fastest since August 2007 was partly countered by a slowdown in manufacturing output growth. The services Purchasing Managers' Index came in at 57.6, up from 56.6 in December. By contrast, the factory PMI declined to 59.6 from 60.6 in December, while it was forecast to ease to 60.3. Germany's private sector activity maintained steady growth momentum in January, flash survey results from IHS Markit showed Wednesday. The composite output index dropped slightly to 58.8 from December's 80-month high of 58.9. The services Purchasing Managers' Index rose to 57.0 from 55.8 a month ago. However, the factory PMI slipped to 61.2 from 63.3 in December.

**Global Equities:** European shares slipped while Asian shares settled on a mixed note as investors kept an eye on political developments. Investors were worried about global trade after US President Donald Trump approved tariffs on solar cells and washing machines imported to the United States.

**Indian Economy:** Government of India after market hours today, 24 January 2017, unveiled details of the re-capitalisation of public sector banks (PSBs) announced in October 2017. The capital infusion plan for 2017-18 includes Rs 80000 crore through recap bonds and Rs 8139 crore as budgetary support. The recap would be accompanied by a strong reforms package across six themes incorporating 30 action points. The reforms agenda is based on the recommendations made at the PSB Manthan held in November, 2017 involving senior management of PSBs and representatives from Government. The reform agenda is aimed at EASE - Enhanced Access and Service Excellence, focusing on six themes of customer responsiveness, responsible banking, credit off take, PSBs as Udyami Mitra, deepening financial inclusion & digitalisation and developing personnel for brand PSB.

**Equity Markets:** Local markets settled with tiny gains after a lackluster and rangebound session of trade as subdued global cues failed to provide clear direction to the market. Both, the Sensex and the Nifty, hit fresh record highs on intraday as well as on closing basis. Key indices gained for the sixth straight day. Indices opened higher and hit fresh record highs in early trade.

**Corporate News:** Indiabulls Housing Finance's consolidated net profit jumped 55.4% to Rs 1167.73 crore on 36.7% growth in total income to Rs 4105.66 crore in Q3 December 2017 over Q3 December 2016. Meanwhile, the board has authorised the company to issue secured non-convertible debentures and unsecured non-convertible debentures, in the nature of subordinate debt, upto Rs 25000 crore and Rs 3000 crore respectively, on private placement basis, in one or more tranches, from time to time. The percentage of banks reporting a rise in nonperforming assets (NPAs) in July-December last year has reduced significantly, indicating stability in credit environment, according to a report. The latest round of the Ficci-IBA survey drew responses from 19 public sector, private and foreign banks representing 59 per cent of the banking industry by asset size. Local Petrol and diesel prices soared further on Wednesday, touching new highs in the national capital and other metros. Petrol was sold at Rs 72.43 per litre in Delhi, the highest in three years. Diesel was sold Rs 63.38 per litre in the capital city.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	389.1	95.5	13.4
MF(INR cr)	(140.5)	291.6	554.3

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	48,430	40,541	32,931
F&O(INR cr)	1,041,405	728,505	630,415

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.1	10.4	10.8
NSE VIX	18.0	14.2	12.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,399	0.0 %	27.2 %	Energy	14,505	(0.6) %	22.7 %
IT	13,250	1.5 %	25.1 %	Pharma	9,826	0.6 %	(6.4) %
Metals	4,097	(1.7) %	31.9 %	Finance	11,212	0.2 %	27.0 %
Auto	11,655	(0.6) %	17.5 %	PSU	3,966	3.5 %	12.5 %
FMCG	27,889	0.5 %	18.0 %	Real Estate	356	(0.1) %	62.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Punjab Nat	195	4.8 %	29.8 %	United Spi	3,488	(7.0) %	70.4 %
Interglobe	1,238	3.8 %	18.7 %	Bharti Air	460	(6.6) %	34.4 %
St Bk of I	330	3.7 %	12.5 %	Idea Cellu	94	(5.5) %	10.3 %
GAIL (Indi	485	3.0 %	26.0 %	Tata Motor	404	(3.4) %	(14.2) %
Bank of Ba	178	3.0 %	3.5 %	Tata Motor	231	(3.0) %	(17.9) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (NOV)	25-01-2018	13:30	CAD	-	0.015
Retail Sales Ex Auto (MoM) (NOV)	25-01-2018	13:30	CAD	-	0.008
ECB Deposit Facility Rate (JAN 25)	25-01-2018	12:45	EUR	-	(0.004)
ECB Marginal Lending Facility (JAN 25)	25-01-2018	12:45	EUR	-	0.0025
ECB President Draghi holds press conference in Frankfurt	25-01-2018	13:30	EUR	-	-
European Central Bank Rate Decision (JAN 25)	25-01-2018	12:45	EUR	-	0
German GfK Consumer Confidence (FEB)	25-01-2018	7:00	EUR	-	10.8
German IFO Business Climate (JAN)	25-01-2018	9:00	EUR	-	117.2
German IFO Current Assessment (JAN)	25-01-2018	9:00	EUR	-	125.4
German IFO Expectations (JAN)	25-01-2018	9:00	EUR	-	109.5
BBA Loans for House Purchase (DEC)	25-01-2018	9:30	GBP	-	39507
CBI Reported Sales (JAN)	25-01-2018	11:00	GBP	-	20
CBI Total Dist. Reported Sales (JAN)	25-01-2018	11:00	GBP	-	24
BOJ Minutes of Policy Meeting	25-01-2018	23:50	JPY	-	-
Corporate Service Price (YoY) (DEC)	25-01-2018	23:50	JPY	-	0.008
National Consumer Price Index (YoY) (DEC)	25-01-2018	23:30	JPY	-	0.006
National Consumer Price Index Ex-Fresh Food (YoY) (DEC)	25-01-2018	23:30	JPY	-	0.009
Natl CPI Ex Fresh Food, Energy (YoY) (DEC)	25-01-2018	23:30	JPY	-	0.003
Supermarket Sales (YoY) (DEC)	25-01-2018	5:00	JPY	-	(0.006)
Tokyo Consumer Price Index (YoY) (JAN)	25-01-2018	23:30	JPY	-	0.01
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (JAN)	25-01-2018	23:30	JPY	-	0.008
Tokyo CPI Ex-Fresh Food, Energy (YoY) (JAN)	25-01-2018	23:30	JPY	-	0.004
Advance Goods Trade Balance (DEC)	25-01-2018	13:30	USD	-	-
Continuing Claims (JAN 13)	25-01-2018	13:30	USD	-	-
EIA Natural Gas Storage Change (JAN 19)	25-01-2018	15:30	USD	-	(183)
EIA Working Natural Gas Implied Flow (JAN 19)	25-01-2018	15:30	USD	-	(183)
Initial Jobless Claims (JAN 20)	25-01-2018	13:30	USD	-	-
Kansas City Fed Manf. Activity (JAN)	25-01-2018	16:00	USD	-	14
Leading Ind. (DEC)	25-01-2018	15:00	USD	-	0.004



New Home Sales (DEC)	25-01-2018	15:00	USD	-	-
New Home Sales (MoM) (DEC)	25-01-2018	15:00	USD	-	0.175
Retail Inventories (MoM) (DEC)	25-01-2018	13:30	USD	-	0.001
U.S. to Sell USD28 Bln 7-Year Notes	25-01-2018	18:00	USD	-	-
Wholesale Inventories (MoM) (DEC P)	25-01-2018	13:30	USD	-	0.008

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