



26 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,491	1.0 %	13.6 %
BSE SENSEX	34,142	1.0 %	14.1 %
CNX BANK	25,303	1.4 %	17.4 %
CNX MIDCAP	19,708	1.7 %	13.7 %
CNX SMALLCAP	8,343	1.9 %	18.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,310	1.4 %	2.0 %
S&P 500	2,747	1.6 %	1.9 %
FTSE 100	7,244	(0.1) %	(5.3) %
HANG SENG	31,267	1.0 %	2.5 %
NIKKEI	21,893	0.7 %	(6.9) %
SHANGHAI COMPOSITE	3,289	0.6 %	(1.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.73	(0.5) %	1.7 %
EUR/USD	1.23	(0.2) %	2.4 %
GBP/USD	1.40	0.1 %	3.4 %
USD/JPY	106.88	(0.0) %	(5.2) %
USD/AUD	1.28	(0.1) %	(0.3) %
USD/SGD	1.32	(0.0) %	(1.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	1.2 %	5.3 %
Gold(INR/10g)	30,390	0.0 %	3.5 %
Gold Comex(USD/oz)	1,331	(0.1) %	1.7 %
SILVER(INR/1Kg)	38,343	0.1 %	(0.7) %
Aluminium(USD/MT)	2,210	0.7 %	(2.0) %
Copper(USD/MT)	7,074	0.6 %	(1.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	2.8 %	0.4 %

Global Economy: Eurozone inflation slowed slightly to 1.3% in January from 1.4% in December, final data from Eurostat showed Friday. A similar slower increase in prices was last seen in July 2017. The inflation figure continues to stay below the European Central Bank's target of 'below, but close to 2 percent'. Germany's economy expanded as initially estimated in the fourth quarter largely on foreign demand, detailed report from Destatis showed Friday. Gross domestic product climbed 0.6% sequentially, slower than the 0.7% expansion seen in the third quarter. However, on a yearly basis, the calendar-adjusted GDP advanced at a faster pace of 2.9%, after rising 2.7% a quarter ago. The price-adjusted GDP grew 2.3% versus 2.2% in the third quarter. Overall nationwide consumer prices in Japan climbed 1.4% on year in January after rising 1% in December. Core CPI, which excludes food prices, advanced an annual 0.9% unchanged from the previous month.

Global Equities: US stocks saw considerable upside on Friday. A continued drop by treasury yields contributed to the rally on Wall Street, with the ten-year yield pulling back further off the four-year closing high set on last Wednesday. The continued softness in treasury yields came as the Federal Reserve issued its monetary policy report to Congress, with the central bank hinting that it still plans three interest rates hikes in 2018.

Indian Economy: A Group of Ministers on GST on Saturday decided to go in for phased launch of e-way Bill system and recommended that it be made mandatory for inter-State movement of goods from April 1 this year.

Equity Markets: Domestic stocks scored strong gains on last trading day of the week on steady buying demand for index pivotals. The Sensex settled well above the psychological 34,000-mark after regaining that level in intraday trade. The Sensex and the Nifty settled at over 1-week high on broad-based buying. Domestic stocks were boosted by positive Asian stocks. Bank stocks rose while metal and mining stocks also gained across the board.

Corporate News: The Reliance Group has signed pacts with the Andhra Pradesh Government for investments worth Rs 50,000 crore in the electronics, IT and petroleum sectors, in phases. The MoUs were signed on Sunday on the second day of the Confederation of Indian Industry (CII) partnership summit. Local oil marketing companies stocks could see some selling pressure following soaring oil prices. The WTI Crude oil futures jumped near two week high amid sustained buying on Friday. AU Small Finance Bank announced that India Ratings has upgraded rating of the bank to AA-/Stable from A+/Positive earlier. The chemicals industry is expected more than double and touch \$300 billion by 2025 from \$147 billion now, clocking an annual growth rate of 15-20% according to Chemexcil.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(347.9)	(106.5)	7.3
MF(INR cr)	1,080.4	625.8	549.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,308	36,846	33,405
F&O(INR cr)	410,335	891,450	650,735

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.5	23.3	11.8
NSE VIX	14.2	16.8	12.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,303	1.4 %	17.4 %	Energy	13,817	1.1 %	16.9 %
IT	12,871	1.1 %	21.5 %	Pharma	9,095	2.6 %	(13.4) %
Metals	4,029	3.2 %	29.7 %	Finance	10,519	1.2 %	19.2 %
Auto	10,927	0.7 %	10.1 %	PSU	3,190	1.1 %	(9.5) %
FMCG	26,670	0.8 %	12.8 %	Real Estate	323	0.9 %	47.2 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Tata Steel	678	6.3 %	46.4 %	Siemens	1,172	(1.8) %	(10.0) %
Sun Pharma	570	5.2 %	(17.7) %	GAIL (Indi	458	(1.7) %	19.1 %
Avenue Sup	1,300	4.8 %	105.0 %	Asian Pain	1,102	(1.5) %	1.1 %
Hind.Zinc	328	4.4 %	12.5 %	Oracle Fin	4,032	(1.4) %	6.5 %
NHPC Ltd	28	3.8 %	(14.4) %	Punjab Nat	113	(1.0) %	(24.3) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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