



INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 10,478 | (0.1) % | 13.4 % |
| BSE SENSEX | 33,848 | (0.2) % | 13.2 % |
| CNX BANK | 25,490 | (0.0) % | 18.3 % |
| CNX MIDCAP | 20,991 | 0.1 % | 21.1 % |
| CNX SMALLCAP | 9,014 | 0.5 % | 27.5 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 24,838 | 0.3 % | 24.9 % |
| S&P 500 | 2,688 | 0.2 % | 19.0 % |
| FTSE 100 | 7,623 | 0.0 % | 6.2 % |
| HANG SENG | 29,864 | 0.9 % | 34.8 % |
| NIKKEI | 22,784 | (0.6) % | 16.3 % |
| SHANGHAI COMPOSITE | 3,296 | 0.6 % | 5.1 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 64.16 | 0.1 % | (4.8) % |
| EUR/USD | 1.19 | 0.4 % | 12.3 % |
| GBP/USD | 1.34 | 0.3 % | 9.1 % |
| USD/JPY | 113.19 | (0.1) % | (2.4) % |
| USD/AUD | 1.29 | (0.6) % | (6.1) % |
| USD/SGD | 1.34 | (0.2) % | (6.3) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 60 | (0.6) % | 14.0 % |
| Gold(INR/10g) | 29,250 | 0.5 % | 5.2 % |
| Gold Comex(USD/oz) | 1,293 | 0.5 % | 11.7 % |
| SILVER(INR/1Kg) | 38,260 | 1.0 % | (1.7) % |
| Aluminium(USD/MT) | 2,200 | 2.9 % | 29.2 % |
| Copper(USD/MT) | 7,140 | 1.7 % | 28.1 % |

FIXED INCOME

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

Global Economy: Chicago-area business activity expanded at a faster rate in the month of December, MNI Indicators revealed in a report on Thursday. MNI Indicators said its Chicago business barometer climbed to 67.6 in December from 63.9 in November, with a reading above 50 indicating growth. Eurozone's economic expansion remains solid and broad-based, and is expected to sustain its strong momentum into next year, the European Central Bank said in its regular bulletin. Overall, incoming data are generally pointing to unabated upside growth momentum in the fourth quarter of 2017 and around the turn of the year. The ECB Staff raised the growth projections for euro area in its latest round of forecasts. They now see 2.4% growth for this year, 2.3% for 2018, 1.9% for 2019 and 1.7% in 2020.

Global Equities: US stocks saw lax trades though the DOW hit a fresh record high amid thin movement. Upbeat data kept sentiments supported.

Indian Economy: A slowdown in the economy coupled with high stress level in the banking sector is expected to restrict credit growth at around 8 per cent during the current fiscal despite government's thrust on loan expansion, says a study by industry chamber ASSOCHAM. However, this would be slightly better than the five decade low growth of 5.1 per cent in non-food credit recorded for the financial year ended March 2017. There could be some uptick in lending towards the micro, small and medium enterprises (MSME) sector with the government asking banks to increase their exposure to the sector as they are one of the largest employers.

Equity Markets: Local indices, led by index pivots State Bank of India and HDFC, logged modest losses in volatile trade. The Sensex settled below the psychological 34,000 mark after regaining that mark in intraday trade. Weakness in European stocks weighed on sentiment. Indices dropped for the second day in a row. The Sensex and the Nifty, both, hit one-week low. Indices opened higher and traded with small gains in early trade. However, markets dropped in late trade with the Sensex hitting one-week low.

Corporate News: Larsen & Toubro (L&T), India's biggest infrastructure and project execution company, has won a Rs 1,000-crore contract to maintain 5 million smart meters in Uttar Pradesh and Bihar over the next eight years, according to media reports. Indian Oil Corporation (IndianOil) would initiate production of second generation ethanol by utilising crop residues and other biomass as feedstock at village Baoli in Panipat district of Haryana. Metal stocks would be in focus as global Copper prices continued their march higher on Thursday, rallying to their highest level in almost four years and putting the metal on track for its best annual performance in nearly seven years.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 68.4 | (56.3) | 4.6 |
| MF(INR cr) | 1,012.1 | 407.6 | 580.6 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 45,579 | 33,022 | 32,152 |
| F&O(INR cr) | 1,350,886 | 706,813 | 622,778 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 10.5 | 10.2 | 10.9 |
| NSE VIX | 12.3 | 13.8 | 12.2 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 25,490 | (0.0) % | 18.3 % | Energy | 14,289 | (0.3) % | 20.9 % |
| IT | 11,496 | (0.1) % | 8.5 % | Pharma | 9,584 | (0.6) % | (8.8) % |
| Metals | 3,960 | 2.1 % | 27.5 % | Finance | 10,438 | (0.2) % | 18.3 % |
| Auto | 11,858 | (0.4) % | 19.5 % | PSU | 3,694 | (1.9) % | 4.8 % |
| FMCG | 26,614 | (0.1) % | 12.6 % | Real Estate | 345 | 3.0 % | 57.5 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| DLF | 264 | 6.2 % | 79.6 % | I O C L | 392 | (2.4) % | 2.8 % |
| Oil India | 376 | 4.2 % | 13.8 % | Dabur Indi | 345 | (2.3) % | 23.0 % |
| Hindalco I | 275 | 3.6 % | 42.2 % | St Bk of I | 308 | (2.0) % | 5.2 % |
| UPL | 763 | 3.1 % | 3.8 % | Bank of Ba | 163 | (2.0) % | (5.6) % |
| Hind.Zinc | 311 | 2.6 % | 6.8 % | Punjab Nat | 171 | (1.9) % | 13.9 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|---|-------------|------------------|---------------|---------------|-----------------------|
| Private Sector Credit (MoM) (NOV) | 29-12-2017 | 0:30 | AUD | - | 0.004 |
| Private Sector Credit (YoY) (NOV) | 29-12-2017 | 0:30 | AUD | - | 0.053 |
| Euro-Zone M3 Money Supply (YoY) (NOV) | 29-12-2017 | 9:00 | EUR | - | 0.05 |
| German Consumer Price Index (MoM) (DEC P) | 29-12-2017 | 13:00 | EUR | - | 0.003 |
| German Consumer Price Index (YoY) (DEC P) | 29-12-2017 | 13:00 | EUR | - | 0.018 |
| Baker Hughes U.S. Rig Count (DEC29) | 29-12-2017 | 18:00 | USD | - | 931 |

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