



30 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,130	0.5 %	20.5 %
BSE SENSEX	36,283	0.6 %	21.3 %
CNX BANK	27,498	0.2 %	27.6 %
CNX MIDCAP	21,273	(0.9) %	22.7 %
CNX SMALLCAP	9,077	(1.7) %	28.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,439	(0.7) %	6.5 %
S&P 500	2,854	(0.7) %	5.9 %
FTSE 100	7,672	0.1 %	0.3 %
HANG SENG	32,967	(0.6) %	8.0 %
NIKKEI	23,629	(0.0) %	0.5 %
SHANGHAI COMPOSITE	3,523	(1.0) %	5.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.59	(0.2) %	(0.1) %
EUR/USD	1.24	(0.4) %	3.0 %
GBP/USD	1.40	(1.4) %	4.0 %
USD/JPY	109.07	(0.1) %	(3.2) %
USD/AUD	1.24	(0.1) %	(3.2) %
USD/SGD	1.31	0.4 %	(1.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	1.0 %	9.6 %
Gold(INR/10g)	30,223	(0.9) %	2.9 %
Gold Comex(USD/oz)	1,355	(0.9) %	3.5 %
SILVER(INR/1Kg)	39,197	1.2 %	1.5 %
Aluminium(USD/MT)	2,238	1.0 %	(0.8) %
Copper(USD/MT)	7,064	1.7 %	(1.6) %

FIXED INCOME

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

Global Economy: Personal income in the US rose by slightly more than expected in the month of December, according to a report released by the Commerce Department on Monday, while personal spending increased in line with estimates. The Commerce Department said personal income climbed by 0.4%. Retail sales in Japan recorded a seasonally adjusted growth of 0.9% on month in December, the Ministry of Economy, Trade and Industry said on Tuesday, following the 1.8% rise in November. On a yearly basis, retail sales jumped 3.6%.

Global Equities: Profit selling was seen in US equities after the record surge. Buying interest was somewhat subdued on the first session of the week.

Indian Economy: The Economic Survey 2017-18 estimated India's GDP to grow 7 - 7.5% in 2018-19, an impressive increase from its prediction of 6.75% growth this fiscal. The survey underlines the role of the newly introduced Goods and Services Tax (GST), the new Indian Bankruptcy Code, the implementation of the recapitalization package to strengthen the public sector banks, further liberalization of FDI and the export uplift from the global recovery, in contributing to the economic growth this year. The survey noted that as per the quarterly estimates; there was a reversal of the declining trend of GDP growth in the second quarter of 2017-18, led by the industry sector.

Equity Markets: Key benchmark indices logged modest gains on upbeat GDP growth prospects. Both, the Sensex and the Nifty, hit fresh record highs on intraday as well as on closing basis. Gains were led by index pivots HDFC, HDFC Bank and Maruti Suzuki India. However, fall in Dr Reddy's Laboratories and ITC capped strong gains on the bourses.

Corporate News: Tech Mahindra's consolidated net profit rose 12.8% to Rs 943 crore on 22.2% rise in revenue to Rs 7776 crore in Q3 December 2017 over Q2 September 2017. On a consolidated basis, Wockhardt reported loss after tax of Rs 41 crore in Q3 December 2017, lower than loss after tax of Rs 54 crore in Q3 December 2016. Sales rose 1.01% Rs 1005 crore in Q3 December 2017 over Q3 December 2016. Moil said that the meeting of board of directors of the company will be held on 5 February 2018, to consider the proposal for buy back of the fully paid-up equity shares of the company.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	212.0	103.9	15.0
MF(INR cr)	(29.9)	276.5	550.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,926	41,051	33,055
F&O(INR cr)	319,545	759,142	634,342

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.1	10.5	10.8
NSE VIX	17.9	14.6	12.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,498	0.2 %	27.6 %	Energy	14,381	(0.6) %	21.7 %
IT	13,243	1.0 %	25.0 %	Pharma	9,622	(1.1) %	(8.4) %
Metals	4,141	0.1 %	33.3 %	Finance	11,331	0.9 %	28.4 %
Auto	11,678	1.5 %	17.7 %	PSU	3,705	(1.4) %	5.1 %
FMCG	27,557	(0.6) %	16.6 %	Real Estate	349	(0.3) %	59.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Maruti Suz	9,631	3.8 %	58.6 %	Dr Reddy's	2,357	(6.0) %	(14.1) %
Eicher Mot	27,454	3.5 %	7.5 %	Oil India	366	(4.0) %	10.9 %
H D F C	1,968	3.1 %	28.3 %	Lupin	912	(3.9) %	(36.4) %
Bharti Inf	353	2.9 %	7.2 %	GAIL (Indi	474	(3.9) %	23.3 %
Petronet L	251	2.7 %	21.0 %	Punjab Nat	174	(3.8) %	16.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Conditions (DEC)	30-01-2018	0:30	AUD	-	12
NAB Business Confidence (DEC)	30-01-2018	0:30	AUD	-	6
Exports (MoM) (DEC)	30-01-2018	7:00	CHF	-	0.008
Imports (MoM) (DEC)	30-01-2018	7:00	CHF	-	0.023
KOF Leading Indicator (JAN)	30-01-2018	8:00	CHF	-	111.3
Swiss Watch Exports (YoY) (DEC)	30-01-2018	7:00	CHF	-	0.063
ECB's Mersch speaks in Frankfurt	30-01-2018	16:30	EUR	-	-
Euro-Zone Business Climate Indicator (JAN)	30-01-2018	10:00	EUR	-	1.66
Euro-Zone Consumer Confidence (JAN F)	30-01-2018	10:00	EUR	-	1.3
Euro-Zone Economic Confidence (JAN)	30-01-2018	10:00	EUR	-	116
Euro-Zone Gross Domestic Product s.a. (QoQ) (4Q A)	30-01-2018	10:00	EUR	-	0.006
Euro-Zone Gross Domestic Product s.a. (YoY) (4Q A)	30-01-2018	10:00	EUR	-	0.026
Euro-Zone Industrial Confidence (JAN)	30-01-2018	10:00	EUR	-	9.1
Euro-Zone Services Confidence (JAN)	30-01-2018	10:00	EUR	-	18.4
French Gross Domestic Product (QoQ) (4Q A)	30-01-2018	6:30	EUR	-	0.006
French Gross Domestic Product (YoY) (4Q A)	30-01-2018	6:30	EUR	-	0.023
German Consumer Price Index (MoM) (JAN P)	30-01-2018	13:00	EUR	-	0.006
German Consumer Price Index (YoY) (JAN P)	30-01-2018	13:00	EUR	-	0.017
Bank of England Governor Carney Speaks Before Lawmakers	30-01-2018	15:30	GBP	-	-
M4 Ex IOFCs 3M Annualised (DEC)	30-01-2018	9:30	GBP	-	0.034
M4 Money Supply (YoY) (DEC)	30-01-2018	9:30	GBP	-	0.037
Money Supply M4 (MoM) (DEC)	30-01-2018	9:30	GBP	-	0.001
Mortgage Approvals (DEC)	30-01-2018	9:30	GBP	-	-
Net Consumer Credit (DEC)	30-01-2018	9:30	GBP	-	-
Net Lending Sec. on Dwellings (DEC)	30-01-2018	9:30	GBP	-	-
BOJ Summary of Opinions	30-01-2018	23:50	JPY	-	-
Industrial Production (MoM) (DEC P)	30-01-2018	23:50	JPY	-	0.005
Industrial Production (YoY) (DEC P)	30-01-2018	23:50	JPY	-	0.036
Trade & Disbursements (YoY) (DEC)	30-01-2018	23:50	JPY	-	0.0211



Conf. Board Expectations (JAN)	30-01-2018	15:00	USD	-	99.1
Conf. Board Present Situation (JAN)	30-01-2018	15:00	USD	-	156.6
Consumer Confidence Index (JAN)	30-01-2018	15:00	USD	-	122.1
S&P CoreLogic CS 20-City (MoM) SA (NOV)	30-01-2018	14:00	USD	-	0.007
S&P/Case-Shiller 20-City Index n.s.a (NOV)	30-01-2018	14:00	USD	-	203.84
S&P/Case-Shiller Composite-20 (YoY) (NOV)	30-01-2018	14:00	USD	-	0.0638
S&P/Case-Shiller US Home Price Index (NOV)	30-01-2018	14:00	USD	-	195.63
S&P/Case-Shiller US Home Price Index (YoY) (NOV)	30-01-2018	14:00	USD	-	0.0617
U.S. to Sell 4-Week Bills	30-01-2018	16:30	USD	-	-
U.S. to Sell USD20 Bln 52-Week Bills	30-01-2018	16:30	USD	-	-

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