



31 Jan.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,050	(0.7) %	19.6 %
BSE SENSEX	36,034	(0.7) %	20.5 %
CNX BANK	27,269	(0.8) %	26.6 %
CNX MIDCAP	21,103	(0.8) %	21.7 %
CNX SMALLCAP	8,923	(1.7) %	26.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,077	(1.4) %	5.0 %
S&P 500	2,822	(1.1) %	4.7 %
FTSE 100	7,588	(1.1) %	(0.8) %
HANG SENG	32,607	(1.1) %	6.9 %
NIKKEI	23,292	(1.4) %	(0.9) %
SHANGHAI COMPOSITE	3,488	(1.0) %	4.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.61	0.1 %	(0.1) %
EUR/USD	1.24	(0.1) %	3.3 %
GBP/USD	1.41	(0.2) %	4.7 %
USD/JPY	109.00	(0.4) %	(3.3) %
USD/AUD	1.24	(0.0) %	(2.9) %
USD/SGD	1.31	0.4 %	(1.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(0.9) %	8.6 %
Gold(INR/10g)	30,305	0.3 %	3.2 %
Gold Comex(USD/oz)	1,339	(1.2) %	2.3 %
SILVER(INR/1Kg)	39,040	(0.4) %	1.1 %
Aluminium(USD/MT)	2,252	0.6 %	(0.2) %
Copper(USD/MT)	7,062	(0.0) %	(1.7) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	0.1 %	0.3 %

Global Economy: Consumer confidence in the US rebounded by more than expected in the month of January, according to a report released by the Conference Board on Tuesday. The Conference Board said its consumer confidence index edged up to 125.4 in January from an upwardly revised 123.1 in December. Eurozone economy grew at the fastest pace in a decade in 2017, outpacing many advanced economies. Gross domestic product expanded 2.5% in 2017, which was the fastest since 2007, Eurostat reported Tuesday. In the fourth quarter, GDP expanded 0.6% sequentially, slightly slower than the 0.7% increase seen in the third quarter.

Global Equities: US stocks took a tumble as a drop from record highs continued. Traders were also looking ahead to the Federal Reserve's monetary policy announcement on Wednesday.

Indian Economy: India's external sector continued to be resilient and strong in 2017-18, as observed in the Economic Survey 2017-18. India's balance of payments situation, which has been benign and comfortable since 2013-14, continued to be so in the first half of 2017-18, despite some rise in the Current Account Deficit (CAD) in the first quarter, with a relatively lower CAD in the second quarter. India's CAD stood at US\$7.2 billion (1.2% of GDP) in Q2 of 2017-18, narrowing sharply from US\$ 15.0 billion (2.5% of GDP) in the preceding quarter.

Equity Markets: Local indices, led by slide in index heavyweights Reliance Industries (RIL), HDFC and ICICI Bank, registered modest losses in last session. Negative global cues weighed on the sentiment. The Sensex and the Nifty, both, hit almost 1-week closing low. Bank stocks fell. Most IT and realty stocks declined. Shares of Amber Enterprises settled with modest premium on its debut. The Sensex settled a tad above psychological 36,000 mark after falling below that level in late trade.

Corporate News: Mahindra & Mahindra (M&M) announced its foray into the sprayers business under the aegis of its Farm Equipment Sector through the acquisition of a 26% equity stake in M.I.T.R.A. Agro Equipments, a Maharashtra-based AgTech company (MITRA). Under the transaction, which is expected to close by February 2018, M&M will acquire a 26% equity stake in MITRA through a fresh infusion of capital into the company. The association with Mahindra will help accelerate the growth of MITRA, which designs and manufactures proprietary sprayers for horticulture crops. ICICI Bank, L&T, NTPC and Vedanta will announce Q3 results today, 31 January 2018. Dilip Buildcon has been declared lowest (L-1) bidder for a new engineering, procurement and construction (EPC) project valued at Rs 565.02 crore by the National Highways Authority of India in the Maharashtra under NHDP Phase IV-B. Bharat Electronics' net profit fell 18.93% to Rs 302.84 crore on 12.92% rise in total income to Rs 2562 crore in Q3 December 2017 over Q3 December 2016.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	101.3	103.8	15.5
MF(INR cr)	(8.1)	261.6	547.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,917	40,997	33,088
F&O(INR cr)	352,936	739,799	632,983

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.8	10.7	10.9
NSE VIX	16.4	14.7	12.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,269	(0.8) %	26.6 %	Energy	14,369	(0.1) %	21.6 %
IT	13,108	(1.0) %	23.8 %	Pharma	9,564	(0.6) %	(9.0) %
Metals	4,116	(0.6) %	32.5 %	Finance	11,208	(1.1) %	27.0 %
Auto	11,628	(0.4) %	17.2 %	PSU	3,703	(0.1) %	5.0 %
FMCG	27,512	(0.2) %	16.4 %	Real Estate	345	(1.1) %	57.4 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HPCL	393	4.8 %	13.7 %	Emami	1,143	(7.1) %	8.9 %
IOCL	416	4.2 %	9.2 %	Shriram Tr	1,375	(4.0) %	24.5 %
BPCCL	486	3.4 %	14.1 %	Havells In	553	(3.9) %	17.9 %
Petronet L	258	3.0 %	24.6 %	Shree Ceme	17,327	(2.8) %	0.9 %
Hind.Zinc	311	2.2 %	6.6 %	Eicher Mot	26,689	(2.8) %	4.5 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Manufacturing Index (JAN)	31-01-2018	22:30	AUD	-	56.2
CBA Australia PMI Mfg (JAN)	31-01-2018	22:00	AUD	-	57.1
Consumer Prices Index (QoQ) (4Q)	31-01-2018	0:30	AUD	-	0.006
Consumer Prices Index (YoY) (4Q)	31-01-2018	0:30	AUD	-	0.018
Consumer Prices Index RBA Trimmed Mean (QoQ) (4Q)	31-01-2018	0:30	AUD	-	0.004
Consumer Prices Index RBA Trimmed Mean (YoY) (4Q)	31-01-2018	0:30	AUD	-	0.018
Consumer Prices Index RBA Weighted Median (QoQ) (4Q)	31-01-2018	0:30	AUD	-	0.003
Consumer Prices Index RBA Weighted Median (YoY) (4Q)	31-01-2018	0:30	AUD	-	0.019
CoreLogic House Px (MoM) (JAN)	31-01-2018	23:00	AUD	-	(0.004)
Private Sector Credit (MoM) (DEC)	31-01-2018	0:30	AUD	-	0.005
Private Sector Credit (YoY) (DEC)	31-01-2018	0:30	AUD	-	0.054
Gross Domestic Product (MoM) (NOV)	31-01-2018	13:30	CAD	-	0
Gross Domestic Product (YoY) (NOV)	31-01-2018	13:30	CAD	-	0.034
Industrial Product Price (MoM) (DEC)	31-01-2018	13:30	CAD	-	0.014
Raw Materials Price Index (MoM) (DEC)	31-01-2018	13:30	CAD	-	0.055
Credit Suisse Survey Expectations (JAN)	31-01-2018	9:00	CHF	-	52
Swiss National Bank Releases 4Q 2017 Currency Allocation	31-01-2018	6:30	CHF	-	-
UBS Consumption Indicator (DEC)	31-01-2018	7:00	CHF	-	1.67
Manufacturing PMI (JAN)	31-01-2018	1:00	CNY	-	51.6
Non-manufacturing PMI (JAN)	31-01-2018	1:00	CNY	-	55
ECB's Coeure Speaks in Dublin	31-01-2018	9:50	EUR	-	-
Euro-Zone Consumer Price Index Core (YoY) (JAN A)	31-01-2018	10:00	EUR	-	0.009
Euro-Zone Consumer Price Index Estimate (YoY) (JAN)	31-01-2018	10:00	EUR	-	0.014
Euro-Zone Unemployment Rate (DEC)	31-01-2018	10:00	EUR	-	0.087
German Retail Sales (MoM) (DEC)	31-01-2018	7:00	EUR	-	0.023
German Retail Sales (YoY) (DEC)	31-01-2018	7:00	EUR	-	0.044
German Unemployment Change (000's) (JAN)	31-01-2018	8:55	EUR	-	-
German Unemployment Claims Rate s.a. (JAN)	31-01-2018	8:55	EUR	-	0.055
PPC China Data Index (YoY) (JAN)	31-01-2018	0:00	CNY	-	(0.000)



GfK Consumer Confidence (JAN)	31-01-2018	0:01	GBP	-	(13)
Lloyds Business Barometer (JAN)	31-01-2018	0:01	GBP	-	28
Annualized Housing Starts (DEC)	31-01-2018	5:00	JPY	-	-
BOJ Iwata makes a speech in Oita	31-01-2018	1:30	JPY	-	-
BOJ Outright Bond Purchase 1~3 Years	31-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	31-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years	31-01-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	31-01-2018	1:10	JPY	-	-
Construction Orders (YoY) (DEC)	31-01-2018	5:00	JPY	-	0.205
Consumer Confidence Index (JAN)	31-01-2018	5:00	JPY	-	44.7
Foreign Buying Japan Bonds (JAN 26)	31-01-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JAN 26)	31-01-2018	23:50	JPY	-	-
Housing Starts (YoY) (DEC)	31-01-2018	5:00	JPY	-	(0.004)
Japan Buying Foreign Bonds (Yen) (JAN 26)	31-01-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JAN 26)	31-01-2018	23:50	JPY	-	-
Vehicle Production (YoY) (DEC)	31-01-2018	4:00	JPY	-	0.009
ANZ Job Advertisements (MoM) (JAN)	31-01-2018	21:00	NZD	-	(0.003)
ADP Employment Change (JAN)	31-01-2018	13:15	USD	-	-
Chicago Purchasing Manager (JAN)	31-01-2018	14:45	USD	-	67.6
DOE Cushing OK Crude Inventory (JAN 26)	31-01-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 26)	31-01-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (JAN 26)	31-01-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (JAN 26)	31-01-2018	15:30	USD	-	-
Employment Cost Index (4Q)	31-01-2018	13:30	USD	-	0.007
FOMC Rate Decision (Lower Bound) (JAN 31)	31-01-2018	19:00	USD	-	0.0125
FOMC Rate Decision (Upper Bound) (JAN 31)	31-01-2018	19:00	USD	-	0.015
MBA Mortgage Applications (JAN 26)	31-01-2018	12:00	USD	-	0.045
Pending Home Sales (MoM) (DEC)	31-01-2018	15:00	USD	-	0.002
Pending Home Sales (YoY) (DEC)	31-01-2018	15:00	USD	-	0.006

..... End of Report

