

Indices	Value	Pts	Chg (%)
SENSEX	34413.16	330.45	0.97
NIFTY	10576.85	100.15	0.96
SGX NIFTY*	10367.50	(193.50)	(1.83)
DOW Jones	23860.46	(1032.89)	(4.15)
S&P 500	2581.00	(100.66)	(3.75)
Nasdaq	6777.16	(274.83)	(3.90)
FTSE	7170.69	(108.73)	(1.49)
CAC	5151.68	(104.21)	(1.98)
DAX	12260.29	(330.14)	(2.62)
Shanghai Composite*	10049.39	(323.20)	(3.12)
Nikkei*	5844.00	(46.70)	(0.79)
Hang Seng*	10331.72	(196.80)	(1.87)

*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10700 CE	3444150	(0.60)
NIFTY	10500 PE	5885550	19.33

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	60.53	(0.62)	(1.01)
Brent Crude (USD)	64.31	(0.50)	(0.77)
Gold (INR)	30107	112.00	0.37
Silver (INR)	38000	137.00	0.36
Copper (INR)	440	(0.05)	(0.01)
Zinc (INR)	222	2.65	1.21
Cotton (INR)	20180	200.00	1.00

Currency	Value	Pts	Chg (%)
USD/Rupee	64.39	0.14	0.22
Euro/Rupee	78.93	0.21	0.27
Pound/Rupee	89.73	0.30	0.34
Euro /USD	1.22	0.00	0.11
Dollar Index	90.25	0.25	0.02

Volatility	Value	Pts	Chg (%)
CBOE VIX	33.46	5.73	20.66
India VIX	17.77	(1.70)	(8.73)

Interest Rates	Value	Bps change
India 10-Yr Yield	7.46%	(7)
US 10-Yr Yield	2.84	0

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	5558.02	34882.10	1426958.30
Advance (Nos)	2197(75%)	1497(75%)	NA
Declines (Nos)	625(21%)	298(21%)	NA
Unchanged	108(4%)	91(4%)	NA

Market Summary

The market ended on a positive note on Thursday. The Market breadth was positive with more than 4 gainers for every 1 losers on BSE. 2197 shares advanced whereas 625 share declined and 108 shares were unchanged on BSE.

BSE Sensex gained 330 points or (1.0%) to close at 34413. Nifty 50 was up 100 points or (1.0%) to settle at 10577. BSE Mid-Cap index advanced 298 points or (1.8%) to settle at 16649. BSE Small-Cap index gained 400 points or (2.3%) to settle at 18131.

Top gainer in BSE Sensex were Sun Pharma (6.3%), Dr Reddys Labs (2.2%), SBI (3.0%), Infosys (2.3%) and Axis Bank (1.8%) whereas top loser in BSE were NTPC (0.7%), Tata Motors (0.7%), ONGC (0.6%), Adani Ports (0.4%) and ITC (0.4%).

US markets closed negative, Dow Jones Industrial Average closed at 23860, declining 1033 points (4.2%), S&P 500 was down 101 points (3.8%) to close at 2581 and Nasdaq lost 275 points (3.9%) to close at 7171.

European markets closed negative, FTSE declined 109 points (1.5%) to close at 7171, CAC was down 104 points (2.0%) to close at 5152 and DAX lost 330 points (2.6%) to close at 12260.

Macro News

- Commerce and Industry Minister has made a case for developing automobile clusters at east and west coasts of India to promote growth and exports from the sector. During the forthcoming partnership summit of CII at Visakhapatnam, minister will talk to the chief minister and will make sure to create a global scale infrastructure auto cluster in Andhra Pradesh. The minister envisaged to have at east coast a port-based infrastructure for auto industry which will have all components for the sector

- Coal Vision 2030 has suggested that no new coal mines need to be allocated or auctioned beyond the current pipeline. If adopted by the government this could end commercialisation of coal and halt any further coal block auction. According to the document the total capacity of mines allocated and auctioned, including Coal India, SCCL and Neyveli Lignite, as on date is about 1,500 million tonnes per annum at the current rated capacity. In view of the likely demand, there is limited requirement of starting new coal mines except the ones already auctioned or allocated.

Institutional Activity	08-Feb	Cash Feb'2018
FII (INR Crs)		
Buy	4396	37565
Sell	6693	42425
Net	(2297)	(4859)
DII (INR Crs)		
Buy	5671	30113
Sell	3297	25282
Net	2374	4831

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	3743.75	3499.40	229468	4.43
INDEX OPTIONS	125660.77	123639.09	1001414	(2.00)
STOCK FUTURES	11636.11	10333.70	1087506	0.53
STOCK OPTIONS	7346.05	7240.91	104195	5.63
Total	148386.69	144713.10		

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
Sun Pharma	583.40	6.32
Dr Reddys Labs	2178.95	3.18
SBI	301.45	2.97
Infosys	1134.55	2.33
Axis Bank	568.50	1.75
Losers (INR)		
NTPC	163.65	(0.70)
Tata Motors	374.85	(0.70)
ONGC	188.55	(0.66)
Adani Ports	405.00	(0.43)
ITC	273.65	(0.40)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	18131.19	399.56	2.25
S&P BSE Mid-Cap	16649.07	298.33	1.82
S&P BSE Auto	25284.12	292.11	1.17
S&P BSE BANKEX	29396.43	324.24	1.12
S&P BSE Capital Goods	19381.67	275.41	1.44
S&P BSE FMCG	10570.95	38.42	0.36
S&P BSE Healthcare	14344.59	405.77	2.91
S&P BSE IT	12211.40	168.72	1.40
S&P BSE Metals	14913.7	198.97	1.35
S&P Oil & Gas	15653.96	(38.61)	(0.25)

Key News

ACC Q4 net surges 126% to INR 2 bn; recommends dividend of INR 15 per share

Cement maker ACC Ltd reported its fourth-quarter profit more than doubled from a year earlier. Profit rose 126% to INR 2.06 billion the quarter ended Dec. 31, from INR 908.7 million a year earlier. Net sales were up 30% at INR 34.17 billion. Analysts on average had expected the company to post a profit of INR 1.85 billion. ACC shares were trading 3 % higher after the results. The company's board has recommended dividend of 15 rupees per share.

Bharat Forge Q3 net jumps 77.3% to INR 2.28 bn; revenue at INR 14 bn

Auto components major Bharat Forge reported a 77.39% jump in net profit at INR 2.28 billion for the quarter ended on December 31. The company had posted a net profit of INR 1.28 billion for the same period in the previous fiscal. Its revenue from operations stood at INR 13.90 billion. It was at INR 9.9 billion in the same period of previous fiscal. Revenue from operations is not comparable due to the introduction of GST from July 1, 2017 which replaced excise duty and other input taxes.

Heidelberg Cement posts Q3 net profit at INR 31.76 crore

Heidelberg Cement India Ltd reported a net profit of INR 31.76 Cr for the quarter ended December 2017. However, the company had posted a net loss of INR 3.58 crore in the corresponding quarter of the previous fiscal. The total income of the company increased to INR 500.5 Cr, over INR 471.41 Cr in the year-ago period. The company said that the construction activities picked up as availability of sand/aggregates improved in most parts of central India during the third quarter of the ongoing fiscal. Despite further hardening of petcoke and fuel prices during the quarter, total operating costs remained at par on y-o-y basis driven by concerted efforts on consumption parameters and the EBITDA margin improved to 17.1 percent of net sales.

BHEL reports 64% rise in Q3 net profit

Bharat Heavy Electricals (BHEL) has reported results for third quarter ended December 31, 2017. The company has reported rise of 63.77% in its net profit at INR 153.19 Cr for the quarter under review as compared to net profit of INR 93.54 Cr for the same quarter in the previous year. Total income of the company increased marginally by 0.37% at INR 6763.84 Cr for Q3FY18 as compared INR 6738.60 Cr for the corresponding quarter previous year

International Data

Country	Data	Forecast	Previous
UK	Manufacturing Production	0.30%	0.40%

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