

Indices	Value	Pts	Chg (%)
SENSEX	28743.32	(69.56)	(0.24)
NIFTY	8879.60	(17.10)	(0.19)
SGX NIFTY*	8917.00	5.50	0.06
DOW Jones	20812.24	(25.20)	(0.12)
S&P 500	2363.64	(6.11)	(0.26)
Nasdaq	5825.44	(36.46)	(0.62)
FTSE	7263.44	10.44	0.14
CAC	4858.58	13.40	0.28
DAX	11834.41	11.74	0.10
Shanghai Composite*	3242.66	14.00	0.43
Nikkei*	19217.00	98.01	0.51
Hang Seng*	23791.00	50.27	0.21

*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	9000 CE	4130550	5.02
NIFTY	8900 PE	2631975	0.18

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	54.14	0.13	0.24
Brent Crude (USD)	56.65	0.14	0.25
Gold (INR)	29566	(144.00)	(0.48)
Silver (INR)	43247	(177.00)	(0.41)
Copper (INR)	401	2.35	0.59
Zinc (INR)	188	0.30	0.16
Cotton (INR)	21060	(20.00)	(0.09)

Currency	Value	Pts	Chg (%)
USD/Rupee	66.69	(0.01)	(0.01)
Euro/Rupee	70.54	0.00	0.00
Pound/Rupee	82.58	0.00	0.00
Euro /USD	1.06	(0.00)	(0.01)
Dollar Index	101.32	0.20	0.20

Volatility	Value	Pts	Chg (%)
CBOE VIX	12.92	0.83	6.87
India VIX	13.79	0.11	0.80

Interest Rates	Value	Bps change
India 10-Yr Yield	6.87%	(1)
US 10-Yr Yield	2.40%	3

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	4988.27	27515.84	251750.65
Advance (Nos)	1455 (51%)	862 (53%)	NA
Declines (Nos)	1315 (46%)	688 (43%)	NA
Unchanged	92 (3%)	61 (4%)	NA

Market Summary

The market ended on a negative note on Tuesday. The market breadth was positive with 1 loser for every 1 gainer on BSE. 1455 shares advanced whereas 1315 shares declined and 92 shares were unchanged on BSE.

BSE Sensex declined 70 points or 0.2% to close at 28743. Nifty 50 was down 17 points or 0.2% to settle at 8880. BSE Mid-Cap index was up 18 points or 0.1% to settle at 13552. BSE Small-Cap index gained 81 points or 0.6% to settle at 13691.

Top gainer in BSE Sensex were BHEL (5.6%), Bharti Airtel (2.7%), Asian Paints (2.3%), Yes Bank (2.2%) and Hindalco (2.1%) whereas top loser in BSE were Coal India (2.5%), Bajaj Auto (1.6%), NTPC (1.2%), TCS (0.9%) and ITC (0.8%).

US markets closed negative, Dow Jones Industrial Average closed at 20812, declining 25 points (0.1%), S&P 500 was down 6 points (0.3%) to close at 2364 and Nasdaq lost 36 points (0.6%) to close at 5825.

European markets closed positive, FTSE gained 10 points (0.1%) to close at 7263, CAC was up 13 points (0.3%) to close at 4859 and DAX was up 12 points (0.1%) to close at 11834.

Macro News

- India's core sector grew at 3.4% in the month of January 2017 (vs 5.6% in Dec'16). Coal output grew by 4.8% (vs 4.4% in Dec), Steel output grew by 11.4% (vs 14.9% in Dec), Petroleum refinery output was down 1.5% (vs 6.4% in Dec), Cement output was down by 13.3% (vs contraction 8.7% in Dec), Crude output was up 1.3% (vs contraction of 0.8% in Dec) and Electricity output was up 4.8% (vs 6.0% in Dec).
- Indian economy grew at 7% in Q3FY17, from 7.4% in the previous quarter and 7.2% expansion in Q3FY16. CSO expects Indian economy to grow at 7.1% in FY17 against earlier projection of 7.9%.
- India's 12 major ports saw cargo traffic increase of 7.1% to 535 MT during 10MFY17. Kandla port handled the highest traffic volume at 88 MT followed by Paradip Port (73 MT), Mumbai Port (53 MT), JNPT (51 MT) and Visakhapatnam (51 MT).
- India's manufacturing PMI and monthly auto sales number for the month of February 2017 will be released today. PMI is likely to come at 50.3 (vs 50.4 in Jan'17). Coal India will also reports its monthly production and offtake data.

Institutional Activity	Cash	
	28-Feb	Feb 2017
FII (INR Crs)		
Buy	9291	107722
Sell	8145	99018
Net	1146	8704
DII (INR Crs)		
Buy	3844	61116
Sell	3576	60181
Net	268	935

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	1141.99	1204.25	272039	0.25
INDEX OPTIONS	22673.88	21391.32	765923	3.93
STOCK FUTURES	7738.91	7523.28	946673	1.42
STOCK OPTIONS	2928.01	2876.08	45768	53.62
Total	34482.78	32994.93		

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
BHEL	162.00	5.88
Bharti Airtel	365.15	2.66
Asian Paints	1024.45	2.29
Yes Bank	1452.80	2.18
Hindalco	184.10	2.11
Losers (INR)		
Coal India	321.80	(2.48)
Bajaj Auto	2758.25	(1.56)
NTPC	163.10	(1.24)
TCS	2466.50	(0.90)
ITC	262.15	(0.83)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	13690.81	80.93	0.59
S&P BSE Mid-Cap	13552.22	18.44	0.14
S&P BSE Auto	21486.06	(52.40)	(0.24)
S&P BSE BANKEX	23482.44	(11.36)	(0.05)
S&P BSE Capital Goods	15333.49	102.24	0.67
S&P BSE FMCG	8799.89	(28.98)	(0.33)
S&P BSE Healthcare	15384.97	1.90	0.01
S&P BSE IT	10376.10	(25.53)	(0.25)
S&P BSE Metals	11893.05	50.50	0.43
S&P Oil & Gas	13534.47	(183.36)	(1.34)

Key News

Tata Steel's Ferro-Chrome plant at Gopalpur starts production

Tata Steel's ferro chrome plant at Gopalpur, in Odisha has commenced production. The plant was built at an investment of INR 542 cr and has installed capacity of 55000 TPA. Besides the plant at Gopalpur, Tata Steel has two other ferro-chrome plants in Odisha - 65000 TPA plant at Bamnipal in Keonjhar district and the other at Athagarh in Cuttack district of 55000 TPA capacity.

Hindalco gets green nod for INR 240 cr copper plant expansion

Hindalco Industries has received the environment clearance for setting up of a new cast copper rod plant in Gujarat's Bharuch district at a cost of INR 240 cr. Hindalco propose to expand production capacity of continuous cast copper rod from 2,44000 TPA to 4,84000 TPA by setting up a new unit.

L&T Hydrocarbon Engineering gets 5-year job order from Shell

Larsen and Toubro Hydrocarbon Engineering has signed a 5-year framework agreement with Shell for engineering, procurement and construction management services.

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International Data

Country	Data	Forecast	Previous
UK	Manufacturing PMI	55.7	55.9
US	Crude Oil Inventories	1.5M	0.6M

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