

Thursday, February 02, 2017

Markets To Make A Fresh Start After Union Budget

Indian Market Outlook: Markets registered strong gains after Arun Jaitley presented the Union Budget 2017-18. The major focus was on infrastructure development, increasing investment on rural areas.

Benchmark Index Nifty was up by 1.81%, closed at 8716 after making high of 8722. Bank Nifty Index jumped by 2.59% and closed at 20021 after making a high of 20048.

Realty stocks came in focus as the Budget proposed to provide infrastructure status to affordable housing projects. Unitech, Prestige, HDIL and DLF jumped almost 4-7 percent. Realty index rose 4.96%.

PSU Index moved up by 3.96%, Auto Index rose by 3.60%, FMCG was up by 3.04%, Financial services was up by 2.69%, however IT Index and Pharma closed in negative zone by declining 1% and 0.46% respectively.

In F&O segment Glenmark Pharma and Marico will announce its Q3 results today.

Nifty Future is opening at 8710 as per SGX Nifty at 8:50 am IST, almost 28 points down its previous close of 8738.

Important events to watch out

- 8th Feb RBI Monetary Policy
- 11th Feb to 15th Mar UP Election

Month	FII Activity
Feb	-12513.1
Mar	24201.51
Apr	3056.28
May	-186.61
Jun	3957.95
Jul	10121.56
Aug	8778.01
Sep	3329.62
Oct	-5355.76
Nov	-19981.5
DEC	-11325.03
JAN 2017	-1582.16
FEB 2017	92.73

The FII's figure is positive in cash segment in the first trading day of February. In the last four months, FIIs showed selling but January month ended with moderate sell of 1582.16 crore.

FII Activity for the year 2016 - 17

Open Interest Index F&O and Cash Segment Activity

DATES	CASH			Option			Index			NIFTY INDEX			
	FII	DII	FII+DII	FII option	Pro option	COMB BUY/SELL	FII Index	Pro Index	COMB BUY/SELL	O	H	L	C
1-Feb-17	92.73	1133.7	1226.47	2983	35426	38409	2703	5384	8087	8570	8722	8538	8716
31-Jan-17	-533	237.37	-295.51	-74514	-17700	-92214	-4322	4553	231	8629	8632	8552	8561
30-Jan-17	607.4	40.04	647.4	-35165	5785	-29380	-4927	261	-4666	8636	8663	8618	8633
27-Jan-17	211.8	482.52	694.29	28033	-4566	23467	8859	-2054	6805	8611	8673	8607	8641
	EXPIRY TOTAL		2272.65	EXPIRY TOTAL		-59718	EXPIRY TOTAL		10457				

In cash segment, yesterday, FII have bought shares worth Rs. 92.73 Cr and DII bought shares worth Rs. 1133.74 Cr. Combined buy of Rs.1226.47 Cr. For Feb 2017 Expiry, FII and DII together are net buyer of worth Rs. 2272.65 Cr.

In Index Options, yesterday, FII have bought 2983 contracts and Pro have bought 35426 contracts. Combined there has been a net buy of 38409 contracts.

In Index Futures, last trading day, FII have bought 2703 contracts and Pro have bought 5384 contracts. Combined there has been a net buy of 8087 contracts.

Index		Country	LTP	1Day % Change
Developed Markets				
America	S&P 500 Futures	US	2275.75	0.05%
	Dow Jones Industrial Average	US	19864.09	-0.54%
Europe	DAX Futures	Germany	11593.90	-0.06%
	Euro Stoxx 50 Futures	Eurozone	3239.00	-0.40%
	CAC 40 Futures	Paris	4765.50	-0.36%
	FTSE 100 Futures	London	7064.00	-0.04%
Asia	Nikkei 225 Futures	Japan	19045.00	0.37%
	S&P/ASX 200 Futures	Australia	5582.50	0.22%
Emerging Markets				
America	iBovespa Futures	Brazil	65035.00	0.73%
Asia	Jakarta Stock Exchange Composite Index	Jakarta	5276.00	0.48%
	Hang Seng Futures	China	23072.00	-1.12%
	SET Index	Thailand	1576.93	-0.03%
	KOSPI 200	Korea	269.59	0.57%
	MSCI Emerging Markets	Singapore	909.23	-0.42%

Data as on 1st February 2017. The % change is taken from previous day's close.

International Market Morning Update

Fed kept its interest rate unchanged. The Fed said that the path of the federal funds rate would depend on the economic outlook as informed by incoming data.

S&P 500 yesterday made a low of 2262 and closed at 2274.50 and is currently trading at 2275.75.

German Index Dax is trading in a range of 200 points from 11735 to 11535, yesterday the Index closed at 11627.

MSCI Emerging market Index is trading at 914.23, it took support of its weekly level of 907. Recently the index made a high of 1919. Immediate support for the index is at 907 below which the next target is 902.

List of Top Gainers and Losers on 1st February 2017

TOP GAINER				TOP LOSER			
Symbol	LTP	%change	Sector	Symbol	LTP	%change	Sector
UJIVAN	390.40	7.40	FINANCIAL SERVICES	JKPAPER	90.95	-1.83	PAPER
JMFINANCIL	73.60	7.29	FINANCIAL SERVICES	SYNGENE	540.00	-1.11	PHARMA
AEGISCHEM	137.40	6.31	TRANSPORTATION LOGISTICS	SHILPAMED	697.45	-1.05	PHARMA
LLOYDELENG	282.20	6.29	REALTY-HOUSEHOLD	GHCL	274.70	-0.85	CHEMICALS
EDELWEISS	116.95	6.17	FINANCIAL SERVICES	FINPIPE	491.00	-0.84	REALTY-HOUSEHOLD
MANAPPURAM	83.60	5.89	FINANCIAL SERVICES-NBFC	SHK	317.45	-0.78	FMCG
IIFL	312.55	5.77	FINANCIAL SERVICES	AIAENG	1345.00	-0.69	INFRA-MACHINERY EQUIPMENT
CENTURYPLY	207.00	5.59	REALTY-HOUSEHOLD	TATACOFFEE	122.95	-0.65	FMCG-BEVERAGES
SUDARSCHEM	354.55	5.54	CHEMICALS	LTI	665.00	-0.56	IT
OBEROIRLTY	328.25	5.46	REALTY	CHOLAFIN	1024.00	-0.47	FINANCIAL SERVICES-NBFC
RADICO	118.85	5.32	FMCG-BEVERAGES	LAKSHVILAS	139.95	0.11	BANKS-PRIVATE
RICOAUTO	60.65	5.20	AUTO-AUTOMOBILES AND AUTO PARTS	SUNTECK	246.00	0.18	REALTY
MUTHOOTFIN	320.75	4.94	FINANCIAL SERVICES-NBFC	NAVINFLUOR	2667.00	0.20	CHEMICALS
HERITGFOOD	1039.45	4.82	FMCG-FOOD	SHRIRAMCIT	1900.50	0.34	FINANCIAL SERVICES-NBFC
TATAMETALI	377.70	4.59	METALS AND MINING	BLUESTARCO	531.00	0.40	REALTY-HOUSEHOLD
ESCORTS	379.95	4.50	AUTO-AUTOMOBILES AND AUTO PARTS	PHILIPCARB	259.75	0.43	CHEMICALS
CAPF	676.50	4.39	FINANCIAL SERVICES	GNFC	244.30	0.49	FERTILISERS
RAMCOIND	212.20	4.35	REALTY-HOUSEHOLD	BIRLACORPN	740.85	0.52	CEMENTS
COROMANDEL	327.00	4.27	FERTILISERS	DISHMAN	227.70	0.60	PHARMA
MAGMA	102.40	4.22	FINANCIAL SERVICES-NBFC	GEOMETRIC	252.00	0.62	IT
KALPATPOWR	285.70	4.16	INFRA-POWER	INDIANB	274.00	0.64	BANKS-PSU
TUBEINVEST	599.60	4.13	AUTO-AUTO ANCL AND COMPONENTS	KWALITY	138.35	0.65	FMCG-FOOD
NAHARINDUS	128.00	3.90	TEXTILES AND APPAREL	DALMIASUG	190.65	0.69	FMCG-SUGAR
DEEPAKFERT	259.45	3.88	FERTILISERS	FIEMIND	1074.50	0.72	AUTO-AUTO ANCL AND COMPONENTS
JBMA	254.85	3.72	AUTO-AUTO ANCL AND COMPONENTS	RAYMOND	498.95	0.81	TEXTILES AND APPAREL
GMDCLTD	121.10	3.68	METALS AND MINING	KPRMILL	576.10	0.86	TEXTILES AND APPAREL
JUBILANT	696.10	3.67	PHARMA	MEGH	45.25	0.89	CHEMICALS
TIMETECHNO	91.10	3.64	FMCG-PACKAGING	RAMCOCEM	709.15	0.91	CEMENTS
TATASPONGE	613.30	3.61	METALS AND MINING	MCX	1184.00	0.92	FINANCIAL SERVICES

Dynamic Sector Performance- 1st Feb 2017

SECTOR	% CHANGE TODAY
CEMENTS	3.67%
AUTO-AUTOMOBILES AND AUTO PARTS	2.88%
FINANCIAL SERVICES	2.83%
FINANCIAL SERVICES-NBFC	2.81%
AUTO-TYRES AND TUBES	2.65%
FMCG-PACKAGING	2.57%
BANKS-PSU	2.51%
INFRA-POWER	2.30%
AUTO-AUTO ANCL AND COMPONENTS	2.25%
BANKS-PRIVATE	2.19%
FMCG-SUGAR	2.07%
FMCG-BEVERAGES	1.85%
ENERGY-OIL & GAS	1.65%
ENTERTAINMENT-HOTELS AND LEISURE	1.65%
CHEMICALS	1.50%
INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	1.48%
FMCG-FOOD	1.44%
FMCG	1.40%
MEDIA	0.95%
INFRA-MACHINERY EQUIPMENT	0.84%
FERTILISERS	0.77%
IT	0.66%
DEFENCE	0.24%
INFRA-TELECOM	-0.33%

All the sectors were positive yesterday. Cements, Auto-Automobiles & Auto Parts, Financial Services, NBFC, Auto-Tyres & Tubes, FMCG-Packaging, Banks-PSU, Infra- Power, Banks-Private, FMCG-Sugar were up by more than 2% today.



Dynamic Levels Morning Report

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