

Thursday, January 05, 2017

Nifty and Cash Segment remain Strong, Bank Nifty Struggling

Indian Market Outlook: Nifty to open strong on cues from international markets with S&P gaining momentum after the US FED released its minutes yesterday night. Small cap and midcap stocks are performing and Nifty is gradually heading towards its daily target of 8278, but Bank Nifty is struggling to go up. However, FII's are still not participating in this buy rally which is not triggering a buy breakout in the market. Markets may witness volatility as Bank Nifty's weekly contract will expire today. The index is trading in a narrow range of 300 points and not been able to give breakout of 18250. Nifty has to give a breakout of 8294 above which next weekly target is 8614, NSE small Cap has to sustain above 5950 to set a weekly target of 6208.

The Assembly elections in UP, Punjab, Uttarakhand, Goa and Manipur will be held between February 4 and March 27.

Nifty Future is opening at 8237 as per SGX Nifty at 8:50 am IST, 30 points above its previous close of 8207.

Month	FII Activity
Jan	-14356.01
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	-1561.84

FII Activity for the year 2016 - 17

The net FII's figure in cash market has turned negative in Dec amounting to Rs.11325.03 Cr, after heavy Nov Selling figure, which was Rs. 19981.5 Cr

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	COMB NET	FII Index	Pro Index	COMB BUY	COMB NET	O	H	L	C
4-Jan-17	-801	427.09	-373.6	5315	-20165	-14850	-263350	2794	-3554	-760	49373	8203	8219	8181	8191
3-Jan-17	-500	562.27	61.78	-6320	16371	10051	-248500	-352	-2254	-2606	50133	8196	8219	8149	8192
2-Jan-17	-261	20.66	-240	-20987	-20519	-41506	-258551	-6942	5001	-1941	52739	8210	8212	8134	8180
30-Dec-16	-586	725.26	139.62	3135	12182	15317	-217045	11960	-4076	7884	54680	8120	8197	8115	8186
	EXPIRY TOTAL		-412.2	EXPIRY TOTAL		-30988		EXPIRY TOTAL		2577					

In cash segment, last trading day, FII have sold shares worth Rs.801 Cr and DII bought shares worth Rs.427.09 Cr. A combined sell of Rs.373.60 Cr. For this expiry, FII and DII together are net sell worth Rs. 412.20 Cr.

In Index Options, last trading day, FII have bought 5315 contracts, below its post Demonetization average of 8577 contracts. Pro have sold 20165 contracts, below its post Demonetization average of 26619 contracts. Combined there has been a net sell of 14850 contracts, below its post Demonetization average of 31662 contracts. For the current expiry, FII and Pro combined are net sellers of 30988 contracts.

In Index Futures, last trading day, FII have bought 2794 contracts, below its post Demonetization average of 3577 contracts. Pro have sold 3554 contracts, below its post Demonetization average of 4177 contracts. Combined there has been a net sell of 760 contracts below its post Demonetization average of 5200 contracts. For the current expiry, FII and Pro combined are net buyers of 2577 contracts.

Index		Country	1Day % Change
Developed Markets			
America	S AND P 500 INDEX	US	0.53
	DJIA INDEX	US	0.33
Europe	DAX INDEX	Germany	-0.03
	EURO STOXX 50 INDEX	Eurozone	-0.09
	CAC 40 INDEX	Paris	-0.04
	FTSE 100 INDEX	London	0.2
Asia	NIKKEI 225 INDEX	Japan	2.51
	ASX 200 INDEX	Australia	0.056
Emerging Markets			
America	BOVESPA INDEX	Brazil	-0.36
Asia	JAKARTA COMPOSITE INDEX	Jakarta	0.478
	HANG SENG INDEX	China	-0.07
	SET INDEX	Thailand	1.34
	PHILIPPINE STOCK INDEX	Philippine	2.47
	KOSPI INDEX	Korea	0.06
	STRAITS TIMES INDEX	Singapore	0.77

Data as on 4th January 2017. The % change is taken from previous day's close.

International Market Morning Update

The Morgan Stanley Emerging Markets Index is trading up by 0.63%, displaying a sustained strength in the emerging markets.

S&P 500 surged after Federal reserve released it's minutes which indicate, that if employment and growth in the economy picks up then interest rate may be increased faster to control inflation. US market has remained stronger on expectations that after US President elect Donald Trump joins office, he may announce tax cuts and increase infrastructure spending to stimulate US economy.

German Index Dax is displaying extraordinary strength where, after giving a breakout above its 1 year high is trading at 11588.

List of Top Gainers and Losers on 4th Jan 2017

TOP GAINER				TOP LOSER			
Symbol	LTP	%change	Sector	Symbol	LTP	%change	Sector
JUBILANT	716	12.2	PHARMA	MANAPPURAM	69.45	-4.5	JEWELLERY
SHK	335.65	10.0	FMCG	RAYMOND	505.9	-3.8	TEXTILES AND APPAREL
MUKANDLTD	70.8	5.9	METALS AND MINING	TRIVENI	64.45	-3.7	FMCG-SUGAR
BODALCHEM	135.95	4.9	CHEMICALS	RAMCOIND	201.6	-2.7	REALTY-HOUSEHOLD
SUPPETRO	213.05	4.7	CHEMICALS	CROMPTON	152	-2.5	REALTY-HOUSEHOLD
MRPL	106.7	4.3	ENERGY-OIL & GAS	DISHMAN	224.7	-2.3	PHARMA
LUMAXIND	818	3.9	AUTO-AUTOMOBILES AND AUTO PARTS	KCPSUGIND	31.55	-2.2	FMCG-SUGAR
CHENNPETRO	315.3	3.8	ENERGY-OIL & GAS	DCMSHRIRAM	218	-2.1	DIVERSIFIED-SUGAR AND GAS
RADICO	115.1	3.7	FMCG-BEVERAGES	SREINFRA	78.35	-2.0	FINANCIAL SERVICES-NBFC
CAPF	608.9	3.5	FINANCIAL SERVICES	IIFL	257.15	-2.0	FINANCIAL SERVICES
COSMOFILMS	347.5	3.1	FMCG-PACKAGING	ESCORTS	321.2	-1.7	AUTO-AUTOMOBILES AND AUTO PARTS
SSWL	675	2.8	AUTO-AUTO ANCL AND COMPONENTS	RALLIS	202	-1.4	CHEMICALS
SHRIRAMCIT	1900	2.6	FINANCIAL SERVICES-NBFC	BAJAJFINSV	2974.35	-1.4	FINANCIAL SERVICES-NBFC
LTI	697.9	2.6	IT	NILKAMAL	1422.25	-1.3	REALTY-HOUSEHOLD
GNFC	231.5	2.6	FERTILISERS	VIPIND	121.75	-1.2	REALTY-HOUSEHOLD
SMLISUZU	1174.35	2.4	AUTO-AUTOMOBILES AND AUTO PARTS	SUNDRMFAST	290.05	-1.1	AUTO-AUTO ANCL AND COMPONENTS
OU DHSUG	113.8	2.4	FMCG-SUGAR	GULFOILLUB	680	-1.1	ENERGY-OIL & GAS
MEGH	43.05	2.4	CHEMICALS	TATACOFFEE	115.6	-1.1	FMCG-BEVERAGES
ITDCEM	163.9	2.3	INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	SOMANYCERA	484.15	-1.1	REALTY-HOUSEHOLD
GANECOS	174.9	2.2	TEXTILES AND APPAREL	TRIDENT	59.3	-1.1	TEXTILES AND APPAREL
NAVINFLUOR	2599	2.2	CHEMICALS	CARBORUNIV	251.05	-1.1	AUTO-AUTOMOBILES AND AUTO PARTS
MGL	840.6	2.2	ENERGY-OIL & GAS	EIDPARRY	265	-1.0	FMCG-SUGAR
IGPL	242.15	2.2	CHEMICALS	GAEL	91.6	-0.9	FMCG-FOOD
NOCIL	71.5	2.1	CHEMICALS	LAKSHVILAS	138.9	-0.9	BANKS-PRIVATE
HINDOILEXP	69.45	2.1	ENERGY-OIL & GAS	KALPATPOWR	263.3	-0.8	INFRA-POWER
WHIRLPOOL	950.45	2.0	REALTY-HOUSEHOLD	CUB	131.3	-0.8	BANKS-PRIVATE
DEEPAKFERT	220	2.0	FERTILISERS	AARTIIND	698	-0.8	CHEMICALS
JKPAPER	92.2	1.9	PAPER	MOTILALOFS	515	-0.7	FINANCIAL SERVICES
DWARKESH	356.35	1.9	FMCG-SUGAR	TUBEINVEST	578.75	-0.7	AUTO-AUTO ANCL AND COMPONENTS

Dynamic Sector Performance- 4th Jan 2017

Sector	% Change
FERTILISERS	4.58%
AIRLINES	2.29%
DIVERSIFIED-TYRES & CEMENTS	2.25%
CEMENTS	1.30%
IT	1.27%
FMCG-FOOD	1.22%
FMCG-BEVERAGES	0.90%
FMCG	0.85%
FMCG-PACKAGING	0.69%
FOOTWEAR	0.64%
DIVERSIFIED-CHEMICALS AND TEXTILES	0.55%
ENERGY-OIL & GAS	0.49%
JEWELLERY	0.46%
INFRA-TELECOM	0.45%
INFRA-MACHINERY EQUIPMENT	0.43%
DEFENCE	0.36%
CHEMICALS	0.32%
AUTO-AUTO ANCL AND COMPONENTS	0.25%
INFRA-POWER	0.18%
AUTO-AUTOMOBILES AND AUTO PARTS	0.13%
ENTERTAINMENT-HOTELS AND LEISURE	0.04%
FINANCIAL SERVICES-NBFC	0.03%
FMCG-SUGAR	-0.03%
DIVERSIFIED-TYRES AND FMCG AND CHEMICALS	-0.05%
FINANCIAL SERVICES	-0.05%
BANKS-PRIVATE	-0.44%
MEDIA	-0.56%
BANKS-PSU	-0.60%
AUTO-TYRES AND TUBES	-1.17%
DIVERSIFIED-CEMENTS AND PAPER AND TEXTILE	-1.58%
DIVERSIFIED-SUGAR AND GAS	-1.98%
DIVERSIFIED-SUGAR AND CEMENTS	-2.03%
DIVERSIFIED-STEEL AND LUBRICANT	-2.36%
DIVERSIFIED	-3.00%

Top 3 sectors were Fertilisers, Airlines & Diversified –Tyres & Cement which were up by more than 2%.

Among the sectors which were down more than 2% are Diversified, Diversified-Steel & Lubricant & Diversified- Sugar & Cement.

SUPPORT SHARES							
These stocks were near support on 4th January							
Script	LTP	Support Level		Script	LTP	Support Level	
Large cap stocks				Small & Mid cap stocks			
MCLEODRUSS	139.7	137.5	Month 1 Low	SHIRPUR-G	100.15	98.5	Month 1 Low
PNB	115.3	112	Month 1 Low	ADVENZYMES	1857.6	1824	Month 1 Low
ORIENTBANK	106.8	101.8	Month 1 Low	COFFEEDAY	197.65	212.05	Week 5 Low
DISHTV	84.8	80.75	Month 1 Low	DBREALTY	38.5	41.8	Week 5 Low
BAJAJ-AUTO	2684	2510	Month 2 Low	MBLINFRA	36.35	40.25	Week 1 Low
ENGINEERSIN	153.8	143.7	Month 1 Low	INOXWIND	183.3	188.95	Week 1 Low
ALBK	62.1	57	Month 1 Low	NESTLEIND	5890.15	5940	Month 1 Low
CANBK	263.9	242.4	Month 5 Low	CHOLAFIN	953.3	937	Week 1 Low
JETAIRWAYS	370.4	316.6	Month 15 Low	PEL	1598	1586	Week 1 Low
MRF	50386	46200	Month 3 Low	FMGOETZE	485.6	490.1	Week 1 Low

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