

Thursday, May 18, 2017

## Sell Off In US Markets, Wait & Watch For Nifty's Reaction

**Indian Market Outlook:** Last Day, the Indian Benchmark Index Nifty made a record high of 9533 and closed at at 9526. TATASTEEL, INFRATEL, IBULHSGFIN , TATAMOTORS and ICICI BANK were the top gainers of the Index.

Bank Nifty ended flat from its previous day close and made a high of 22978 and closed at 22936. South bank up by 3.56%, ICICI BANK by 2.25% were among the top movers in the Banking Index.

Small Cap Index, yesterday, made a high of 7662 and closed at 7637, 8 points down from its previous day's close.

Nifty to open gap down by 57 points at 9478 against yesterdays close of 9535 as per SGX Nifty.

### CASH SEGMENT FII AND DII ACTIVITY

DATES	FII	DII	FII+DII
17-May-17	-731.39	614.51	-116.88
16-May-17	858.29	-401.89	456.4
15-May-17	235.33	-65.77	169.56
12-May-17	841.80	-710.83	130.97
11-May-17	1306.71	-1037.20	269.53
10-May-17	893.36	-229.73	663.63
9-May-17	332.87	16.92	349.79
8-May-17	-542.47	663.33	120.86
5-May-17	-363.98	298.11	-65.87
4-May-17	-601.12	926.1	324.98
3-May-17	-517.74	112.36	-405.38
2-May-17	-611.82	541.39	-70.43

On 17th May 17, FII sold Rs.731.39 Crore in cash segment. DII bought Rs.614.51 Crore. In combined FII and DII have a net sell figure of Rs.116.88 Crore.

### Result Today

BANKBARODA	BAJAJ-AUTO	MANGCHEFER	STAR	SPIC
BHAGYNAGAR	BAJAJHLDNG	LAURUSLABS	UNITEDBNK	VIPIND
CIMMCO	GDL	MAFATLAFIN	SURANACORP	ZYLOG
COFFEEDAY	GEECEE	MANAKALUCO	SURANAIND	
21STCENMGM	EIDPARRY	MANAKCOAT	SURANASOL	
AARTIDRUGS	EIMCOELECO	JYOTHYLAB	SURANAT&P	
ABIRLANUVO	GRAPHITE	KARURVYSYA	SUTLEJTEX	
CUMMINSIND	GTNTEX	NFL	SHREERAMA	
AKZOINDIA	IDBI	RAMSARUP	TAKE	
ALKYLAMINE	HMVL	RANEENGINE	TANLA	
DBCORP	HARITASEAT	SADBHIN	TATACOFFEE	
ARSHIYA	IMFA	PATSPINLTD	TDPOWERSYS	
DPL	HSIL	PENIND	TEAMLEASE	
AUTOAXLES	INDIANHUME	PIDILITIND	TECILCHEM	
DWARKESH	INDNIPPON	MUTHOOTFIN	THANGAMAYL	
CESC	INDORAMA	PITILAM	TRITURBINE	

## OPEN INTEREST IN INDEX FUTURES

Date	FII	PRO	CLIENT	DII	Nifty	Bank Nifty
	Net OI Index Futures	Net OI Index Futures	Net OI Index Futures	Net OI Index Futures	Close	Close
17-May-17	82363	-67135	-14973	-255	9526	22936
16-May-17	82244	-65521	-16494	-299	9512	22929
15-May-17	82923	-65448	-17298	-177	9445	22822
12-May-17	84549	-62749	-21647	-153	9401	22672
11-May-17	97634	-69783	-27712	-139	9422	22818
10-May-17	99266	-70784	-28343	-139	9407	22830
9-May-17	104082	-70237	-33760	-85	9317	22707
8-May-17	117928	-74292	-43519	-117	9314	22767
5-May-17	120980	-70195	-51366	581	9285	22605
4-May-17	135575	-77152	-56397	-2026	9360	22720
3-May-17	142477	-68138	-72619	-1720	9312	22307
2-May-17	141055	-63385	-75964	-1706	9314	22341
28-Apr-17	150478	-61721	-86406	-2351	9304	22358

In the Current Expiry, FIIs are net sellers of 68115 contracts in Index Future, since on the starting of the expiry, ie, on 28<sup>th</sup> Apr, the net Open Interest was 150478 and as on last date, ie, on 17<sup>th</sup> May, the net figure is 82363. PRO have a net sell figure of 5414 contracts in the expiry, since on the starting date, ie, on 28<sup>th</sup> Apr, the net figure was (-)61721 and on the last date, ie, on 17<sup>th</sup> May, the net figure is (-)67135. Combined they have a net sell figure of 73529 contracts.

## OPEN INTEREST IN INDEX OPTIONS

Date	FII	PRO	CLIENT	DII	Nifty	Bank Nifty
	Net OI Index Options	Net OI Index Options	Net OI Index Options	Net OI Index Options	Close	Close
17-May-17	-48552	257522	-343990	135021	9526	22936
16-May-17	-66082	247352	-316943	135674	9512	22929
15-May-17	-98718	199353	-236441	135807	9445	22822
12-May-17	-108094	146407	-169622	131310	9401	22672
11-May-17	-101922	202451	-233655	133127	9422	22818
10-May-17	-129513	186101	-188901	132314	9407	22830
9-May-17	-165046	131583	-99162	132626	9317	22707
8-May-17	-173348	149763	-109040	132626	9314	22767
5-May-17	-180661	118709	-70673	132626	9285	22605
4-May-17	-162105	181113	-151833	132826	9360	22720
3-May-17	-178631	141325	-95520	132826	9312	22307
2-May-17	-175074	142406	-100156	132826	9314	22341
28-Apr-17	-172803	127324	-87546	133026	9304	22358

In the Current Expiry, FIIs are net buyers of 124251 contracts in Index options, since on the starting of the expiry, ie, on 28<sup>th</sup> Apr, the net Open Interest was (-)172803 and as on last date, ie, on 17<sup>th</sup> May, the net figure is (-)48552. PRO have a net buy figure of 130198 contracts in the expiry, since on the starting date, ie, on 28<sup>th</sup> Apr, the net figure was 127324 and on the last date, ie, on 17<sup>th</sup> May, the net figure is 257522. In combined they have a net buy figure of 224449 contracts in the expiry.

## INTERNATIONAL MARKET UPDATE

Index		Country	LTP	1Day % Change
<b>Developed Markets</b>				
<b>America</b>	S&P 500 Futures	US	2362.75	0.24%
	Dow Jones Industrial Average	US	20606.93	-1.78%
<b>Europe</b>	DAX Futures	Germany	12585.80	0.35%
	Euro Stoxx 50 Futures	Eurozone	3538.00	-2.29%
	CAC 40 Futures	Paris	5227.80	-2.42%
	FTSE 100 Futures	London	7436.00	0.30%
<b>Asia</b>	Nikkei 225 Futures	Japan	19510.00	-1.29%
	S&P/ASX 200 Futures	Australia	5718.50	-0.01%
<b>Emerging Markets</b>				
<b>America</b>	iBovespa Futures	Brazil	67895.00	-2.11%
<b>Asia</b>	Jakarta Stock Exchange Composite Index	Jakarta	5276.00	0.48%
	Hang Seng Futures	China	25185.50	-0.43%
	SET Index	Thailand	1548.29	0.13%
	KOSPI 200	Korea	297.61	-0.63%
	MSCI Emerging Markets	Singapore	1008.63	-0.63%

## INTERNATIONAL MARKET MORNING UPDATE

International markets witnessed sell off where S&P500 made a low of 2355 from its day high of 2396 and is currently trading at 2363. The Index recently touched its all time high of 2401.

A report has revealed that Trump had asked former FBI Director James Comey to end an investigation of former National Security Adviser Michael Flynn. The situation became worse after Trump fired James Comey and revealed highly classified information to Russian officials. All these has created a national security threat for US. The sell off came after investors raised questions on Trump's decision to fire the FBI Director and the subsequent revelation.

German Index Dax has also shown sell off . Yesterday, the Index fell almost 127 points and closed at 12631. Recently the Index made a high of 12841.

MSCI Emerging market Index is trading at 1003, recently the Index made high of 1011.

## Cash Multi- Bagger Top Gainers and Losers

Stocks	Sector	LTP	% Chg	Stocks	Sector	LTP	% Chg
AVANTIFEED	FMCG-FOOD	1302	7.96%	MANALIPETC	CHEMICALS	39	-10.34%
KRBL	FMCG-FOOD	442	7.50%	EDELWEISS	FINANCIAL SERVICES	179	-5.77%
GUJALKALI	CHEMICALS	473	3.82%	VTL	TEXTILES AND APPAREL	1266	-3.22%
DBL	INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	493	3.80%	PHILIPCARB	CHEMICALS	410	-3.07%
STRTECH	INFRA-TELECOM	169	3.75%	CHAMBLFERT	FERTILISERS	122	-2.79%
KSL	AUTO-AUTO ANCL AND COMPONENTS	417	3.71%	SREINFRA	FINANCIAL SERVICES-NBFC	109	-2.67%
DCMSHRIRAM	DIVERSIFIED	391	3.59%	SRIPIPES	METALS AND MINING	338	-2.60%
SOBHA	REALTY	426	3.51%	IIFL	FINANCIAL SERVICES	477	-2.45%
TFCILTD	FINANCIAL SERVICES-NBFC	114	3.45%	TUBEINVEST	AUTO-AUTO ANCL AND COMPONENTS	677	-2.42%
TIMETECHNO	FMCG-PACKAGING	133	3.37%	AARTIIND	CHEMICALS	932	-2.30%
SUNFLAG	METALS AND MINING	38	3.26%	VIJAYABANK	BANKS-PSU	88	-2.28%
COROMANDEL	FERTILISERS	418	3.15%	RCF	FERTILISERS	91	-2.09%
MINDAIND	AUTO-AUTOMOBILES AND AUTO PARTS	560	2.66%	GMDCLTD	METALS AND MINING	130	-2.00%
MRPL	ENERGY-OIL & GAS	135	2.58%	WELSPUNIND	TEXTILES AND APPAREL	89	-1.99%
JINDALPOLY	FMCG-PACKAGING	425	2.57%	ESSELPACK	FMCG-PACKAGING	259	-1.84%

## Gainers & Losers In F&O Segment

Stocks	Sector	LTP	% Chg	Stocks	Sector	LTP	% Chg
TATASTEEL	METALS AND MINING	494	8.18%	SHREECEM	CEMENTS	18870	-5.39%
CEATLTD	AUTO-TYRES AND TUBES	1846	7.91%	PNB	BANKS-PSU	165	-5.23%
JUSTDIAL	INFRA-TELECOM	524	3.63%	CAPF	FINANCIAL SERVICES	730	-4.64%
SOUTHBANK	BANKS-PRIVATE	26	3.56%	ANDHRABANK	BANKS-PSU	68	-3.96%
INFRATEL	INFRA-TELECOM	390	3.55%	CUMMINSIND	INFRA-MACHINERY EQUIPMENT	1016	-2.99%
MRF	AUTO-TYRES AND TUBES	68055	2.97%	TECHM	IT	431	-2.91%
IBULHSGFIN	FINANCIAL SERVICES-NBFC	1082	2.74%	OFSS	IT	3773	-2.76%
TATAMOTORS	AUTO-AUTOMOBILES AND AUTO PARTS	449	2.71%	CADILAHC	PHARMA	478	-2.49%
JSWSTEEL	METALS AND MINING	207	2.50%	IBREALEST	REALTY	174	-2.47%
ICICIBANK	BANKS-PRIVATE	310	2.35%	HDIL	REALTY	95	-2.31%
JINDALSTEL	METALS AND MINING	116	2.02%	APOLLOHOSP	PHARMA	1280	-2.26%
DCBBANK	BANKS-PRIVATE	197	1.97%	GLENMARK	PHARMA	698	-2.25%
DISHTV	MEDIA-ENTERTAINMENT	102	1.95%	BRITANNIA	FMCG-FOOD	3670	-2.22%
TATAPOWER	INFRA-POWER	85	1.79%	ALBK	BANKS-PSU	88	-2.12%
VEDL	METALS AND MINING	242	1.78%	ACC	CEMENTS	1694	-2.06%

## DYNAMIC SECTOR PERFORMANCE

Sector	% Chg
AUTO-TYRES AND TUBES	3.08%
FMCG-FOOD	2.15%
FOOTWEAR	2.14%
PAPER	0.99%
TEXTILES AND APPAREL	0.83%
FMCG-PACKAGING	0.82%
FMCG-SUGAR	0.54%
AUTO-AUTOMOBILES AND AUTO PARTS	0.43%
DIVERSIFIED	0.36%
INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	0.28%
MEDIA	0.23%
BANKS-PRIVATE	0.13%
AUTO-AUTO ANCL AND COMPONENTS	0.07%
REALTY	0.05%
INFRA-POWER	0.04%
INFRA-TELECOM	0.01%
DEFENCE	-0.04%
REALTY-HOUSEHOLD	-0.08%
PHARMA	-0.11%
METALS AND MINING	-0.23%
INFRA-MACHINERY EQUIPMENT	-0.23%
MEDIA-ENTERTAINMENT	-0.29%
ENERGY-OIL & GAS	-0.31%
FINANCIAL SERVICES-NBFC	-0.34%
CHEMICALS	-0.39%
FMCG	-0.40%
FMCG-BEVERAGES	-0.46%
CEMENTS	-0.51%
FERTILISERS	-0.60%
TRANSPORTATION LOGISTICS	-0.60%
AIRLINES	-0.63%
JEWELLERY	-0.64%
ENTERTAINMENT-HOTELS AND LEISURE	-0.84%
BANKS-PSU	-0.84%
IT	-0.89%
FINANCIAL SERVICES	-1.05%

## Major Index Performance

Benchmark Indices	Last	% Change	Prev. High	Prev. Low
Nifty 50	9526	0.14%	9533	9486
Nifty 50 Futures	9514	-0.06%	9540	9497
Bank NIFTY Futures	22919	-0.10%	22960	22856
NIFTY Free Float Smallcap 100	7637	-0.10%	7662	7614
India Vix	10.64	0.71%	10.81	9.25
USD/INR	64.175	0.31%	64.175	63.955
Major Indices	Last	% Change	Prev. High	Prev. Low
Nifty Realty	274	-0.16%	276	273
Nifty Financial Services	9344	-0.04%	9367	9318
Nifty PSU Bank	3818	-0.61%	3841	3802
Nifty Infrastructure	3304	0.33%	3314	3282
Nifty Private Bank	12621	0.19%	12644	12551
Nifty Auto	10670	0.68%	10680	10559
Nifty Metal	3031	2.25%	3042	2978
Nifty Energy	12073	-0.22%	12142	12052
Nifty IT	10437	-0.23%	10486	10372
Nifty FMCG	24267	-0.43%	24410	24133
Nifty PSE	4208	-0.16%	4234	4203
Nifty Pharma	10223	-0.24%	10264	10184
Nifty Media	3220	-0.10%	3226	3200

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### Report Prepared By:

**Vikash Kandoi - NISM-201500086430**