

Tuesday, January 24, 2017

## Bulls Regain 8400 In Nifty ,Strong Support Seen In Emerging Markets

**Indian Market Outlook:** India's benchmark index Nifty closed at 8391 on Monday, 40 points up from Friday's close of 8349. The Index recovered from intraday low of 8327 and closed near day's high after the announcement of Supreme Court rejecting the Plea to change the budget date from 1st Feb.

Nifty index has taken a support of its daily level of 8322. Bank Nifty remained flat today. It opened at 18762, made a high of 18910 and closed at 18842. The next resistance level of Bank Nifty is 19072 if Bank Nifty breaks 18910 levels. Buying was also seen in the cash segment, the Small Cap index too gained 55 points from its previous day close.

Indian benchmark index saw a positive day and sharp buying was witnessed from 8338 which was previous day low and markets closed at 8398 a overall positive day.

Important results to watch out for today are HDFC BANK, M&M FINANCE, BHARTI AIRTEL, HCL TECH.

Nifty Future is opening at 8432 as per SGX Nifty at 8:50 am IST, almost 22 points above its previous close of 8410.

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	-3341.21

FII Activity for the year 2016 - 17

The net FII's figure in cash market continues to be negative in Jan 2017, amounting to Rs. 3341.21 Cr, after heavy Nov & Dec Selling figure, which was Rs. 19981.5 Cr and 11325.03 Cr respectively.

## 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
23-Jan-17	-289	519.99	231.19	-21011	14918	-6093	4190	997	5187	8330	8404	8327	8399
20-Jan-17	-26.3	-175.28	-201.6	-40164	-77671	-117835	6096	2284	8380	8404	8424	8341	8349
19-Jan-17	-132	379.63	247.37	-7971	6500	-1471	-3608	-1316	-4924	8418	8445	8404	8435
18-Jan-17	319.1	245.03	564.17	2078	-9359	-7281	-13471	9696	-3775	8404	8460	8397	8417
17-Jan-17	142.2	-607.23	-465	2718	-23305	-20587	-2113	-9	-2122	8415	8441	8378	8398
16-Jan-17	-347	203.45	-143.8	20804	15889	36693	-341	-948	-1289	8391	8427	8374	8413
13-Jan-17	-118	-473.5	-591.1	4486	-9929	-5443	1710	-401	1309	8458	8461	8373	8400
12-Jan-17	-12.8	-110.08	-122.9	12750	24983	37733	16849	-15301	1548	8391	8417	8382	8407
11-Jan-17	-627	1116.2	488.85	24178	58900	83078	12089	-8231	3858	8328	8389	8322	8381
10-Jan-17	-21.2	253.36	232.16	8773	29634	38407	-3102	-1896	-4998	8263	8294	8261	8289
9-Jan-17	-325	96.82	-228.3	-5802	-7810	-13612	-2678	1338	-1340	8259	8263	8228	8236
6-Jan-17	-255	165.29	-89.92	4032	-16634	-12602	8131	-1646	6485	8282	8307	8233	8244
5-Jan-17	-86.9	449	362.1	74555	66200	140755	26818	-6045	20773	8227	8283	8224	8274
4-Jan-17	-801	427.09	-373.6	5315	-20165	-14850	2794	-3554	-760	8203	8219	8181	8191
3-Jan-17	-500	562.27	61.78	-6320	16371	10051	-352	-2254	-2606	8196	8219	8149	8192
2-Jan-17	-261	20.66	-240	-20987	-20519	-41506	-6942	5001	-1941	8210	8212	8134	8180
30-Dec-16	-586	725.26	139.62	3135	12182	15317	11960	-4076	7884	8120	8197	8115	8186
	<b>EXPIRY TOTAL</b>		<b>-128.9</b>	<b>EXPIRY TOTAL</b>		<b>120754</b>	<b>EXPIRY TOTAL</b>		<b>31669</b>				

In cash segment, yesterday, FII have sold shares worth Rs. 288.80 Cr and DII bought shares worth Rs. 519.99 Cr. A combined buy of Rs.231.19 Cr. For Jan 2017 Expiry, FII and DII together are net seller of worth Rs. 128.90 Cr.

In Index Options, yesterday, FII have sold 21011 contracts. Pro have bought 14918 contracts on last day. Combined there has been a net sell of 6093 contracts. The option data shows that market may fall.

In Index Futures, last trading day, FII have bought 4190 contracts. Pro have bought 997 contracts. Combined there has been a net buy of 5187 contracts.

Index		Country	LTP	1Day % Change
<b>Developed Markets</b>				
<b>America</b>	S&P 500 Futures	US	2261.25	-0.03%
	Dow Jones Industrial Average	US	19799.85	-0.14%
<b>Europe</b>	DAX Futures	Germany	11565.10	-0.01%
	Euro Stoxx 50 Futures	Eurozone	3272.00	-0.49%
	CAC 40 Futures	Paris	4832.00	-0.34%
	FTSE 100 Futures	London	7106.00	-0.08%
<b>Asia</b>	Nikkei 225 Futures	Japan	18825.00	-0.53%
	S&P/ASX 200 Futures	Australia	5580.50	-0.06%
<b>Emerging Markets</b>				
<b>America</b>	iBovespa Futures	Brazil	66310.00	1.79%
<b>Asia</b>	Jakarta Stock Exchange Composite Index	Jakarta	5276.00	0.48%
	Hang Seng Futures	China	22934.00	0.33%
	SET Index	Thailand	1577.88	0.45%
	KOSPI 200	Korea	266.73	-0.15%
	MSCI Emerging Markets	Singapore	902.14	0.99%

Data as on 23<sup>rd</sup> January 2017. The % change is taken from previous day's close.

## International Market Morning Update

International markets saw a mixed bag with US markets flat for the day with S&P futures closing at 2161 trading in the range of 2171-2150 for the last few weeks.

German Dax was down by 0.5% and a lower dollar helped emerging markets with Brazil up by more than 1.5 percent.

## List of Top Gainers and losers on 23<sup>rd</sup> january 2017

TOP GAINER				TOP LOSER			
Symbol	LTP	%change	Sector	Symbol	LTP	%change	Sector
NAHARINDUS	129.15	6.12	TEXTILES AND APPAREL	PEL	1698.15	-3.95	PHARMA
TRIDENT	65.85	5.78	TEXTILES AND APPAREL	ESSELPACK	245.50	-3.78	FMCG-PACKAGING
SREINFRA	87.40	5.36	FINANCIAL SERVICES-NBFC	FIEMIND	1100.00	-3.72	AUTO-AUTO ANCL AND COMPONENTS
VTL	1195.00	4.60	TEXTILES AND APPAREL	NAVINFLUOR	2762.00	-3.30	CHEMICALS
MEGH	45.80	4.57	CHEMICALS	GULFOILLUB	648.95	-2.77	ENERGY-OIL & GAS
NATIONALUM	73.90	4.23	METALS AND MINING	CAPF	585.15	-2.18	FINANCIAL SERVICES
DALMIASUG	175.00	3.86	FMCG-SUGAR	SHREECEM	15233.75	-1.70	CEMENTS
TRIVENI	70.50	3.75	FMCG-SUGAR	JKLAKSHMI	352.00	-1.69	CEMENTS
DEEPAKFERT	270.00	3.23	FERTILISERS	LTI	666.70	-1.68	IT
HERITGFOOD	939.95	3.18	FMCG-FOOD	SYNGENE	569.70	-1.65	PHARMA
SHARDACROP	474.00	3.11	CHEMICALS	BIRLACORPN	691.25	-1.54	CEMENTS
GMDCLTD	115.75	3.02	METALS AND MINING	KWALITY	140.70	-1.50	FMCG-FOOD
ODHSUG	130.40	2.96	FMCG-SUGAR	AIAENG	1350.40	-1.30	INFRA-MACHINERY EQUIPMENT
DEEPIND	301.35	2.69	ENERGY-OIL & GAS	NOCIL	75.20	-1.25	CHEMICALS
RALLIS	214.50	2.61	CHEMICALS	BLUESTARCO	509.35	-1.20	REALTY-HOUSEHOLD
HIMATSEIDE	341.30	2.57	TEXTILES AND APPAREL	COROMANDEL	320.95	-1.06	FERTILISERS
PHILIPCARB	268.30	2.40	CHEMICALS	ATUL	2135.00	-1.02	CHEMICALS
JKPAPER	97.10	2.37	PAPER	GABRIEL	108.00	-0.87	AUTO-AUTO ANCL AND COMPONENTS
APLAPOLLO	1037.00	2.23	INFRA-MACHINERY EQUIPMENT	BANCOINDIA	205.65	-0.84	AUTO-AUTO ANCL AND COMPONENTS
KALPATPOWR	270.30	2.21	INFRA-POWER	SSWL	664.80	-0.81	AUTO-AUTO ANCL AND COMPONENTS
CUB	144.90	2.04	BANKS-PRIVATE	KPRMILL	568.10	-0.74	TEXTILES AND APPAREL
TATACOFFEE	123.90	1.97	FMCG-BEVERAGES	SUNTECK	240.00	-0.48	REALTY
NBVENTURES	119.95	1.95	INFRA-POWER	SOMANYCERA	560.00	-0.45	REALTY-HOUSEHOLD
AARTIIND	702.15	1.92	CHEMICALS	TIMETECHNO	88.70	-0.34	FMCG-PACKAGING
GEOMETRIC	262.95	1.76	IT	VIPIND	123.00	-0.32	REALTY-HOUSEHOLD
EDELWEISS	110.30	1.71	FINANCIAL SERVICES	GICHSGFIN	283.60	-0.30	FINANCIAL SERVICES-NBFC
BODALCHEM	135.50	1.65	CHEMICALS	MCX	1191.00	-0.29	FINANCIAL SERVICES
UFLEX	276.35	1.47	FMCG-PACKAGING	BAJAJFINSV	3056.00	-0.26	FINANCIAL SERVICES-NBFC
RPGLIFE	485.00	1.43	PHARMA	TNPL	340.25	-0.25	PAPER

## Dynamic Sector Performance- 23<sup>rd</sup> Jan 2017

Sector	% Change Today
FMCG-SUGAR	1.61%
FMCG-BEVERAGES	1.49%
INFRA-POWER	1.27%
FINANCIAL SERVICES-NBFC	1.14%
ENERGY-OIL & GAS	1.08%
AUTO-AUTOMOBILES AND AUTO PARTS	1.02%
BANKS-PSU	0.92%
FMCG-FOOD	0.76%
CEMENTS	0.74%
AIRLINES	0.68%
CHEMICALS	0.67%
INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	0.56%
INFRA-MACHINERY EQUIPMENT	0.56%
BANKS-PRIVATE	0.47%
INFRA-TELECOM	0.46%
FERTILISERS	0.45%
FINANCIAL SERVICES	0.31%
ENTERTAINMENT-HOTELS AND LEISURE	0.22%
IT	0.19%
AUTO-TYRES AND TUBES	0.13%
FMCG	0.08%
FOOTWEAR	-0.04%
MEDIA	-0.10%
AUTO-AUTO ANCL AND COMPONENTS	-0.22%
FMCG-PACKAGING	-0.32%

The top sectors which ended green in yesterday's trading were FMCG-SUGAR, FMCG-BEVERAGES, INFRA-POWER, FINANCIAL SERVICES-NBFC, ENERGY-OIL & GAS and AUTO-AUTOMOBILES AND AUTO PARTS, which were up by more than 1%.

The sector which remained flat to bearish were FMCG-PACKAGING, AUTO-AUTO ANCL AND COMPONENTS, MEDIA and FOOTWEAR.



# Dynamic Levels Morning Report

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Dynamic Equities Pvt. Ltd - SEBI Investment Advisory Reg. No.: INA300002022

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