

Friday, January 27, 2017

Bulls Power Indian Markets, Nifty Likely To Open Above 8650

Indian Market Outlook: The Indian benchmark indices were powered by bulls on Wednesday, strong buying was seen in all the sectors. Bank Nifty saw a charge of 300 points on the upside.

FII's returned to the cash markets with buying figures over Rs.1300 cr, coupled with strong buying in the derivatives segment. Nifty is likely to move above its resistance levels of 8800-8900 levels in the February F&O expiry. Two major events namely the Union Budget and the RBI credit policy is lined up next week.

Bank Nifty's recent high of 19300 has been crossed and if the Index is able to sustain above 19500, then a big up move towards 20000 levels is a possibility.

Nifty Future is opening at 8668 as per SGX Nifty at 8:50 am IST, almost 60 points above its previous close of 8613.

MONTH	FII ACTIVITY
January	-14356.01
February	-12513.1
March	24201.51
April	3056.28
May	-186.61
June	3957.95
July	10121.56
August	8778.01
September	3329.62
October	-5355.76
November	-19981.5
December	-11325.03
2017, January	-1868.45

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. 1868.45 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
25-Jan-17	1379	383	1761.8	27023	-101198	-74175	15981	-3139	12842	8499	8613	8494	8603
24-Jan-17	93.95	533.49	627.44	-21335	72062	50727	5619	7942	13561	8407	8481	8398	8476
23-Jan-17	-289	519.99	231.19	-21011	14918	-6093	4190	997	5187	8330	8404	8327	8392
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

In cash segment, yesterday, FII have bought shares worth Rs. 1379 Cr and DII bought shares worth Rs. 383 Cr. A combined buy of Rs.1761.80 Cr. For Jan 2017 Expiry, FII and DII together are net buyer of worth Rs. 2260.30 Cr.

In Index Options, yesterday, FII have bought 27023 contracts. Pro have sold 101198 contracts on last day. Combined there has been a net sell of 74175 contracts.

In Index Futures, last trading day, FII have bought 15981 contracts. Pro have sold 3139 contracts. Combined there has been a net buy of 12842 contracts.

Index		Country	LTP	1Day % Change
Developed Markets				
America	S&P 500 Futures	US	2292.75	-0.05%
	Dow Jones Industrial Average	US	20100.91	0.16%
Europe	DAX Futures	Germany	11836.40	-0.04%
	Euro Stoxx 50 Futures	Eurozone	3306.00	-0.54%
	CAC 40 Futures	Paris	4859.00	-0.33%
	FTSE 100 Futures	London	7089.80	-0.15%
Asia	Nikkei 225 Futures	Japan	19460.00	0.00%
	S&P/ASX 200 Futures	Australia	5658.50	0.18%
Emerging Markets				
America	iBovespa Futures	Brazil	66720.00	0.38%
Asia	Jakarta Stock Exchange Composite Index	Jakarta	5276.00	0.48%
	Hang Seng Futures	China	23342.00	-0.10%
	SET Index	Thailand	1588.14	-0.19%
	KOSPI 200	Korea	270.48	0.87%
	MSCI Emerging Markets	Singapore	916.73	0.50%

Data as on 24th January 2017. The % change is taken from previous day's close.

International Market Morning Update

Strong international markets are the backbone of this rally. The American S&P Index futures has surpassed its previous all time high of 2278 and is currently trading at 2291. The index has made a high of 2300. The German Dax is trading at 11840 which is a new monthly high.

Japan Nikkei is trading at 19474 which is 72 points above its previous close of 19402.

List of Top Gainers and losers on 25th january 2017

TOP GAINER				TOP LOSER			
SYMBOL	LTP	%CHANGE	SECTOR	SYMBOL	LTP	%CHANGE	SECTOR
MUTHOOTFIN	322.75	8.00	FINANCIAL SERVICES-NBFC	TIRUMALCHM	760.00	-2.93	CHEMICALS
INDIANB	273.45	6.15	BANKS-PSU	SHK	310.00	-2.78	FMCG
CAPF	627.00	5.98	FINANCIAL SERVICES	JKPAPER	93.35	-2.35	PAPER
MOTILALOFS	568.00	5.89	FINANCIAL SERVICES	MEGH	44.90	-1.75	CHEMICALS
DALMIASUG	194.00	5.38	FMCG-SUGAR	JBMA	258.25	-1.68	AUTO-AUTO ANCL AND COMPONENTS
NILKAMAL	1596.15	5.01	REALTY-HOUSEHOLD	RAYMOND	513.70	-1.54	TEXTILES AND APPAREL
UJJIVAN	364.95	4.12	FINANCIAL SERVICES	KWALITY	139.85	-1.48	FMCG-FOOD
DCMSHRIRAM	276.25	3.85	DIVERSIFIED-SUGAR AND GAS	TATAMETALI	350.40	-1.48	METALS AND MINING
NATIONALUM	78.20	3.78	METALS AND MINING	TUBEINVEST	570.00	-1.46	AUTO-AUTO ANCL AND COMPONENTS
CHOLAFIN	1045.00	3.46	FINANCIAL SERVICES-NBFC	LLOYDELENG	282.05	-1.43	REALTY-HOUSEHOLD
RAIN	68.05	3.34	CEMENTS	JKCEMENT	720.10	-1.40	CEMENTS
VIPIND	126.50	3.31	REALTY-HOUSEHOLD	NOCIL	75.05	-1.38	CHEMICALS
BAJAJELEC	239.00	3.11	REALTY-HOUSEHOLD	APLAPOLLO	1031.00	-1.32	INFRA-MACHINERY EQUIPMENT
RAMCOCEM	659.85	3.00	CEMENTS	PEL	1709.00	-1.20	PHARMA
BALRAMCHIN	144.25	2.81	FMCG-SUGAR	OBEROIRLTY	309.20	-1.17	REALTY
GREENPLY	262.10	2.78	REALTY-HOUSEHOLD	SOMANYCERA	594.00	-1.12	REALTY-HOUSEHOLD
SHRIRAMCIT	2052.55	2.69	FINANCIAL SERVICES-NBFC	IIFL	283.65	-0.96	FINANCIAL SERVICES
MAHSEAMLES	278.50	2.69	METALS AND MINING	BODALCHEM	135.65	-0.91	CHEMICALS
RALLIS	228.20	2.63	CHEMICALS	SHARDACROP	476.05	-0.83	CHEMICALS
MANAPPURAM	80.30	2.62	FINANCIAL SERVICES-NBFC	GUJALKALI	393.45	-0.73	CHEMICALS
CUB	147.30	2.43	BANKS-PRIVATE	DEEPAKFERT	260.45	-0.70	FERTILISERS
MANPASAND	636.50	2.42	FMCG-BEVERAGES	GSFC	110.10	-0.41	FERTILISERS
JUBILANT	711.10	2.37	PHARMA	SHILPAMED	709.95	-0.34	PHARMA
BANCOINDIA	208.05	2.36	AUTO-AUTO ANCL AND COMPONENTS	TATASPONGE	621.75	-0.30	METALS AND MINING
CARBORUNIV	255.00	2.29	AUTO-AUTOMOBILES AND AUTO PARTS	PHILIPCARB	268.90	-0.26	CHEMICALS
RICOAUTO	60.80	2.27	AUTO-AUTOMOBILES AND AUTO PARTS	RPGLIFE	480.00	-0.24	PHARMA
ATUL	2183.20	2.12	CHEMICALS	SUNTECK	239.20	-0.19	REALTY
COROMANDEL	334.50	2.09	FERTILISERS	WSTCSTPAPR	138.00	-0.18	PAPER
MAGMA	99.10	2.06	FINANCIAL SERVICES-NBFC	GEOMETRIC	259.65	-0.17	IT

Dynamic Sector Performance- 25th Jan 2017

Sector	% Change Today
FINANCIAL SERVICES-NBFC	2.30%
BANKS-PSU	2.06%
FOOTWEAR	1.61%
AIRLINES	1.60%
FINANCIAL SERVICES	1.49%
BANKS-PRIVATE	1.47%
ENTERTAINMENT-HOTELS AND LEISURE	1.40%
CEMENTS	1.15%
FMCG-SUGAR	1.07%
INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	0.99%
IT	0.94%
ENERGY-OIL & GAS	0.87%
AUTO-TYRES AND TUBES	0.86%
FMCG-BEVERAGES	0.80%
JEWELLERY	0.74%
FMCG-FOOD	0.70%
AUTO-AUTO ANCL AND COMPONENTS	0.70%
INFRA-POWER	0.56%
INFRA-MACHINERY EQUIPMENT	0.50%
INFRA-TELECOM	0.50%
AUTO-AUTOMOBILES AND AUTO PARTS	0.48%
FERTILISERS	0.43%
CHEMICALS	0.34%
FMCG-PACKAGING	0.16%
FMCG	-0.01%
MEDIA	-0.11%
DEFENCE	-0.32%

Majority of the sectors were positive on last day of expiry. Financial Services – NBFC, Banks –PSU, Financial Services, Banks – Private, Entertainment – Hotels & Leisure, Cements and FMCG –Sugar gained by more than 1% today.

The sector which remained Flat to Bearish were DEFENCE, MEDIA and FMCG which closes marginally down.



Dynamic Levels Morning Report

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