

Monday, January 30, 2017

Markets To Remain Volatile With Trump's Executive Order On Refugees

Indian Market Outlook: We expect Markets to remain volatile today as Trump has passed an executive order banning refugees from seven Muslim dominated states from entering United States. With Finance Minister Arun Jaitley to announce 2017 – 18 union budget on 1st Feb (Wednesday), this week might turnout to be more eventful than otherwise thought. Moreover speculative movement is expected on UP election. First phase of election will start from 11th Feb and results will be declared on 15th of March. RBI to announce its Monetary Policy on 8th Feb, expectation of which will also have a major impact on the markets. Federal Reserve to announce its monetary policy on 1st Feb midnight at 12.30. This may also affect the market movement.

Bull has shown strong control on Indian Market on Friday, where Nifty rallied 0.45% and Bank Nifty rallied 1.21%. Nifty opened at 8611 and made a low of 8607, the index rallied to make high of 8673 and closed at 8641.

FII's continues to buy in cash segment in last three trading sessions. The immediate target for Nifty is 8745.

Bank nifty also participated in the rally on Friday and made a high of 19795 and closed at 19708, 235 points up from its previous day's close of 19473. ICICI Bank has risen by 4.64%, which has 19% weightage in the Banking Index. The next level of Bank Nifty is 19862.

Important result to be announced today is Dish TV, Tech Mahindra, HDFC, Godrej Consumer, Grasim, Bajaj Finance.

Nifty Future is opening at 8629 as per SGX Nifty at 8:50 am IST, almost 44 points below its previous close of 8673.

Important events to watch out

- 1st Feb Union Budget 2017-18
- 1st Feb 12.30 midnight Federal Reserve Monetary Policy (market will take impact of it on 2nd Feb)
- 8th Feb RBI Monetary Policy
- 11th Feb to 15th Mar UP Election

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	-1656.64

FII Activity for the year 2016 - 17

The net FII's figure in cash market is negative in Jan 2017, amounting to Rs. 1656.64 Cr. But in last 3 days FII's have bought 561.51 Cr. in cash segment. In Nov & Dec, there were heavy Selling figures, 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
27-Jan-17	211.8	482.52	694.29	28033	-4566	23467	8859	-2054	6805	8611	8673	8607	8641
	EXPIRY TOTAL		694.29	EXPIRY TOTAL		23467	EXPIRY TOTAL		6805				

In cash segment, yesterday, FII have bought shares worth Rs. 211.80 Cr and DII bought shares worth Rs. 482.52 Cr. A combined buy of Rs.694.29 Cr. For Feb 2017 Expiry, FII and DII together are net buyer of worth Rs. 694.29 Cr.

In Index Options, yesterday, FII have bought 28033 contracts. Pro have sold -4566 contracts on last day. Combined there has been a net buy of 23467 contracts.

In Index Futures, last trading day, FII have bought 8859 contracts. Pro have sold 2054 contracts. Combined there has been a net buy of 6805 contracts.

Index		Country	LTP	1Day % Change
Developed Markets				
America	S&P 500 Futures	US	2281.75	-0.32%
	Dow Jones Industrial Average	US	20093.78	-0.04%
Europe	DAX Futures	Germany	11768.60	-0.33%
	Euro Stoxx 50 Futures	Eurozone	3297.00	-0.33%
	CAC 40 Futures	Paris	4838.50	-0.53%
	FTSE 100 Futures	London	7085.00	-0.29%
Asia	Nikkei 225 Futures	Japan	19300.00	-0.82%
	S&P/ASX 200 Futures	Australia	5607.50	-0.46%
Emerging Markets				
America	iBovespa Futures	Brazil	66480.00	-0.36%
Asia	Jakarta Stock Exchange Composite Index	Jakarta	5276.00	0.48%
	Hang Seng Futures	China	23347.00	-0.08%
	SET Index	Thailand	1591.17	-0.01%
	KOSPI 200	Korea	270.48	0.87%
	MSCI Emerging Markets	Singapore	915.92	-0.09%

Data as on 27th January 2017. The % change is taken from previous day's close.

International Market Morning Update

With Trump's order on refugees, S&P500 has shown a sign of weakness and the index is down by 8 points from 2289, it is currently trading at 2281. S&P 500 has given breakout of its all time high and is trading above that level. However we expect a volatile session in this week as Fed will announce its monetary policy on 1st Feb Mid Night at 12:30.

MSCI Emerging market Index is trading at 915.92 and immediate resistance for the index is 920 above which next target is 929. Thus if emerging market Index gives breakout we might see buying coming in Indian market too.

List of Top Gainers and Losers on 27th January 2017

TOP GAINER				TOP LOSER			
Symbol	LTP	%change	Sector	Symbol	LTP	%change	Sector
IIFL	304.35	6.85	FINANCIAL SERVICES	DALMIASUG	189.05	-2.29	FMCG-SUGAR
CENTURYPLY	196.60	6.70	REALTY-HOUSEHOLD	EDELWEISS	112.60	-2.26	FINANCIAL SERVICES
BLUESTARCO	536.70	5.17	REALTY-HOUSEHOLD	SHRIRAMCIT	2011.25	-1.94	FINANCIAL SERVICES-NBFC
VIPIND	132.55	4.78	REALTY-HOUSEHOLD	INDIANB	267.15	-1.93	BANKS-PSU
GREENPLY	273.95	4.16	REALTY-HOUSEHOLD	RPGLIFE	470.80	-1.89	PHARMA
CUB	153.95	3.95	BANKS-PRIVATE	RICOAUTO	59.55	-1.89	AUTO-AUTOMOBILES AND AUTO PARTS
ATUL	2258.90	3.50	CHEMICALS	SARDAEN	247.45	-1.79	METALS AND MINING
TIRUMALCHM	782.00	3.30	CHEMICALS	NBVENTURES	118.75	-1.78	INFRA-POWER
GHCL	287.90	3.28	CHEMICALS	BODALCHEM	133.40	-1.69	CHEMICALS
VTL	1265.00	3.27	TEXTILES AND APPAREL	CAPLIPOINT	423.50	-1.57	PHARMA
CAPF	644.80	2.99	FINANCIAL SERVICES	EIDPARRY	293.00	-1.55	FMCG-SUGAR
JKLAKSHMI	369.00	2.87	CEMENTS	RAIN	67.05	-1.54	CEMENTS
JKCEMENT	736.75	2.76	CEMENTS	RAYMOND	507.15	-1.50	TEXTILES AND APPAREL
RALLIS	234.00	2.59	CHEMICALS	ESSELPACK	251.25	-1.43	FMCG-PACKAGING
DEEPIND	306.70	2.42	ENERGY-OIL & GAS	HIMATSEIDE	334.60	-1.39	TEXTILES AND APPAREL
ESCORTS	372.35	2.25	AUTO-AUTOMOBILES AND AUTO PARTS	SREINFRA	86.65	-1.37	FINANCIAL SERVICES-NBFC
AEGISCHEM	134.65	2.24	TRANSPORTATION LOGISTICS	TATASPONGE	614.00	-1.35	METALS AND MINING
AARTIIND	720.00	2.08	CHEMICALS	TATAMETALI	345.55	-1.30	METALS AND MINING
MCX	1204.40	1.96	FINANCIAL SERVICES	NOCIL	74.25	-1.20	CHEMICALS
TRIDENT	67.70	1.96	TEXTILES AND APPAREL	WSTCSTPAPR	135.75	-1.20	PAPER
FIEMIND	1125.00	1.93	AUTO-AUTO ANCL AND COMPONENTS	LLOYDELENG	279.10	-1.15	REALTY-HOUSEHOLD
SHK	316.10	1.82	FMCG	SUDARSCHEM	337.45	-1.13	CHEMICALS
RADICO	117.45	1.73	FMCG-BEVERAGES	KWALITY	138.45	-1.04	FMCG-FOOD
FINPIPE	462.50	1.63	REALTY-HOUSEHOLD	JUBILANT	703.40	-1.03	PHARMA
DISHMAN	235.00	1.62	PHARMA	NAHARINDUS	134.50	-1.03	TEXTILES AND APPAREL
SOMANYCERA	604.00	1.60	REALTY-HOUSEHOLD	PHILIPCARB	267.50	-1.00	CHEMICALS
SURYAROSNI	190.90	1.46	REALTY-HOUSEHOLD	SUNTECK	237.50	-0.98	REALTY
FINCABLES	436.75	1.46	INFRA-TELECOM	JBMA	256.40	-0.98	AUTO-AUTO ANCL AND COMPONENTS
CANFINHOME	1761.35	1.44	FINANCIAL SERVICES-NBFC	COROMANDEL	331.45	-0.94	FERTILISERS

Dynamic Sector Performance- 27th Jan 2017

SECTOR	% CHANGE
INFRA-POWER	2.84%
CEMENTS	1.21%
BANKS-PSU	1.12%
INFRA-TELECOM	1.04%
FINANCIAL SERVICES	0.78%
FMCG-FOOD	0.78%
AUTO-AUTOMOBILES AND AUTO PARTS	0.70%
FMCG-BEVERAGES	0.48%
FOOTWEAR	0.45%
FINANCIAL SERVICES-NBFC	0.43%
INFRA-MACHINERY EQUIPMENT	0.42%
AUTO-AUTO ANCL AND COMPONENTS	0.41%
BANKS-PRIVATE	0.41%
ENERGY-OIL & GAS	0.38%
ENTERTAINMENT-HOTELS AND LEISURE	0.30%
AIRLINES	0.28%
IT	0.27%
FMCG-SUGAR	0.18%
CHEMICALS	0.17%
INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	0.12%
FMCG-PACKAGING	0.10%
AUTO-TYRES AND TUBES	-0.08%
FMCG	-0.18%
FERTILISERS	-0.28%
MEDIA	-0.47%
DEFENCE	-0.59%

Top Sectors today were Infra- Power, Cements, Banks-PSU, Infra- Telecom which gained by more than 1%. Sectors which did not perform today were Auto-Tyres & Tubes, FMCG, Fertilizers, Media & Defence



Dynamic Levels Morning Report

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