

Tuesday, January 31, 2017

## Market May Remain Under Pressure On Weak Global Cues And Union Budget

**Indian Market Outlook:** India's benchmark index Nifty opened on a flat note on Monday and traded in a narrow range of 45 points throughout the day and finally closed at 8633, which was 8 points below its Friday's close of 8641. Bank Nifty also showed signs of weakness and closed at 19585, 123 points below its previous close of 19708.

Small cap index stayed in range for the entire trading session yesterday. The benchmark index of cash market, Small Cap closed at 6392, almost flat from Friday's close of 6395. Small Cap Index made a high of 6429 and a low of 6384

FII's continue to buy in cash segment in last three trading sessions.

Important results to be announced today are ONGC, IOC, ICICI Bank, Bajaj-Auto

Nifty Future is opening at 8615 as per SGX Nifty at 8:50 am IST, almost 44 points below its previous close of 8659.

### 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
30-Jan-17	607.4	40.04	647.4	-35165	5785	-29380	-4927	261	-4666	8636	8663	8618	8633
27-Jan-17	211.8	482.52	694.29	28033	-4566	23467	8859	-2054	6805	8611	8673	8607	8641
	EXPIRY TOTAL		1341.69	EXPIRY TOTAL		-5913	EXPIRY TOTAL		2139				

In cash segment, yesterday, FII have bought shares worth Rs. 607.40 Cr and DII bought shares worth Rs. 40.04 Cr. A combined buy of Rs.647.40 Cr. For Feb 2017 Expiry, FII and DII together are net buyer of worth Rs. 1341.69 Cr.

In Index Options, yesterday, FII have sold 35165 contracts. Pro have bought 5785 contracts on last day. Combined there has been a net sell of 5913 contracts.

In Index Futures, last trading day, FII have sold 4927 contracts. Pro have bought 261 contracts. Combined there has been a net sell of 2139 contracts.

Index		Country	LTP	1Day % Change
<b>Developed Markets</b>				
<b>America</b>	S&P 500 Futures	US	2270.50	-0.23%
	Dow Jones Industrial Average	US	19971.13	-0.61%
<b>Europe</b>	DAX Futures	Germany	11665.80	-0.34%
	Euro Stoxx 50 Futures	Eurozone	3266.00	-0.88%
	CAC 40 Futures	Paris	4799.50	-0.79%
	FTSE 100 Futures	London	7048.80	-0.36%
<b>Asia</b>	Nikkei 225 Futures	Japan	19015.00	-1.58%
	S&P/ASX 200 Futures	Australia	5559.50	-0.60%
<b>Emerging Markets</b>				
<b>America</b>	iBovespa Futures	Brazil	64562.00	-2.89%
<b>Asia</b>	Jakarta Stock Exchange Composite Index	Jakarta	5276.00	0.48%
	Hang Seng Futures	China	23347.00	-0.08%
	SET Index	Thailand	1583.22	-0.40%
	KOSPI 200	Korea	268.96	-0.58%
	MSCI Emerging Markets	Singapore	913.09	-0.31%

Data as on 30<sup>th</sup> 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 currently trading at 2269, recent high of the index was 2299. Fed to announce its monetary policy on 1<sup>st</sup> Feb 2017 Mid night at 12:30 which will have bigger impact on the international markets.

German Index Dax has also shown profit booking and has yesterday closed at 11659, recent high of the index was at 11895.

MSCI Emerging market Index is trading at 911.19, recently the index made a high of 1919. Immediate support for the index is at 907 below which next target is 902.

Most Asian markets are trading negative today as U.S. President Donald Trump's new refugee policy has created a fearfull environment in all the emerging Countries.

The focus also remains on the BoJ, FOMC and BoE meetings due this week.

## List of Top Gainers and Losers on 30<sup>th</sup> January 2017

TOP GAINER				TOP LOSER			
Symbol	LTP	%change	Sector	Symbol	LTP	%change	Sector
TATAMETALI	359.55	4.10	METALS AND MINING	CUB	144.05	-6.82	BANKS-PRIVATE
CANFINHOME	1835.00	4.06	FINANCIAL SERVICES-NBFC	NAHARINDUS	127.00	-5.82	TEXTILES AND APPAREL
SREINFRA	90.10	3.62	FINANCIAL SERVICES-NBFC	BLUESTARCO	517.65	-3.35	REALTY-HOUSEHOLD
FINPIPE	479.35	3.51	REALTY-HOUSEHOLD	COROMANDEL	322.00	-3.11	FERTILISERS
SSWL	693.80	3.37	AUTO-AUTO ANCL AND COMPONENTS	GUJALKALI	389.00	-2.90	CHEMICALS
RALLIS	239.55	2.63	CHEMICALS	CHOLAFIN	1018.40	-2.83	FINANCIAL SERVICES-NBFC
BIRLACORPN	744.65	2.58	CEMENTS	FIEMIND	1092.95	-2.67	AUTO-AUTO ANCL AND COMPONENTS
GICHSGFIN	299.25	2.34	FINANCIAL SERVICES-NBFC	ESSELPACK	244.55	-2.65	FMCG-PACKAGING
TIRUMALCHM	802.00	2.27	CHEMICALS	AEGISCHEM	131.40	-2.56	TRANSPORTATION LOGISTICS
CAPF	659.20	2.23	FINANCIAL SERVICES	IIFL	294.95	-2.42	FINANCIAL SERVICES
TRIDENT	69.35	2.21	TEXTILES AND APPAREL	AIAENG	1366.00	-2.23	INFRA-MACHINERY EQUIPMENT
KALPATPOWR	278.45	2.07	INFRA-POWER	SHARDACROP	465.25	-2.20	CHEMICALS
SUNTECK	242.90	2.02	REALTY	OUHDSUG	134.35	-2.11	FMCG-SUGAR
NILKAMAL	1629.00	1.97	REALTY-HOUSEHOLD	RAMCOIND	199.20	-2.02	REALTY-HOUSEHOLD
INDIANB	272.60	1.96	BANKS-PSU	EIDPARRY	287.65	-1.94	FMCG-SUGAR
CENTURYPLY	198.95	1.90	REALTY-HOUSEHOLD	PHILIPCARB	262.65	-1.85	CHEMICALS
DEEPIND	312.65	1.77	ENERGY-OIL & GAS	SARDAEN	242.95	-1.80	METALS AND MINING
DALMIASUG	192.85	1.71	FMCG-SUGAR	LLOYDELENG	273.10	-1.80	REALTY-HOUSEHOLD
WSTCSTPAPR	138.20	1.66	PAPER	RADICO	115.05	-1.71	FMCG-BEVERAGES
QUICKHEAL	273.50	1.64	IT	RICOAUTO	58.60	-1.68	AUTO-AUTOMOBILES AND AUTO PARTS
DHAMPURSUG	174.00	1.61	FMCG-SUGAR	NATIONALUM	77.45	-1.65	METALS AND MINING
APLAPOLLO	1045.00	1.57	INFRA-MACHINERY EQUIPMENT	JMFINANCIL	70.75	-1.59	FINANCIAL SERVICES
GMDCLTD	120.70	1.47	METALS AND MINING	UFLEX	272.40	-1.57	FMCG-PACKAGING
SMLISUZU	1215.05	1.30	AUTO-AUTOMOBILES AND AUTO PARTS	GREENPLY	267.60	-1.49	REALTY-HOUSEHOLD
RAMCOCEM	671.00	1.26	CEMENTS	TIMETECHNO	87.05	-1.47	FMCG-PACKAGING
UCALFUEL	191.00	1.11	AUTO-AUTO ANCL AND COMPONENTS	ELGIEQUIP	190.10	-1.45	INFRA-MACHINERY EQUIPMENT
HIMATSEIDE	338.55	1.10	TEXTILES AND APPAREL	SURYAROSNI	188.45	-1.41	REALTY-HOUSEHOLD
MOTILALOFS	579.00	1.09	FINANCIAL SERVICES	LTI	677.95	-1.37	IT
UJJIVAN	365.45	0.99	FINANCIAL SERVICES	GULFOILLUB	659.00	-1.36	ENERGY-OIL & GAS

## Dynamic Sector Performance- 30<sup>th</sup> Jan 2017

SECTOR	% CHANGE
INFRA-TELECOM	3.86%
BANKS-PSU	0.80%
FINANCIAL SERVICES-NBFC	0.35%
INFRA-POWER	0.26%
FMCG	0.18%
DEFENCE	0.18%
JEWELLERY	0.18%
MEDIA	0.01%
INFRA-CONSTRUCTION ENGINEERING AND MATERIALS	-0.03%
CHEMICALS	-0.07%
AUTO-AUTO ANCL AND COMPONENTS	-0.12%
ENERGY-OIL & GAS	-0.19%
AIRLINES	-0.19%
FOOTWEAR	-0.22%
FINANCIAL SERVICES	-0.23%
IT	-0.26%
INFRA-MACHINERY EQUIPMENT	-0.30%
FMCG-SUGAR	-0.38%
CEMENTS	-0.47%
FMCG-FOOD	-0.56%
AUTO-AUTOMOBILES AND AUTO PARTS	-0.69%
FMCG-BEVERAGES	-0.71%
FERTILISERS	-0.75%
BANKS-PRIVATE	-0.89%
ENTERTAINMENT-HOTELS AND LEISURE	-0.94%
FMCG-PACKAGING	-1.19%
AUTO-TYRES AND TUBES	-1.29%

Top Sectors yesterday were Infra – Telecom and Banks-PSU which rose by more than 0.80%. Top losing sectors were Banks-Private. Entertainment-Hotels & Leisure, FMCG-Packaging and Auto-Tyres & Tubes which were down by more than 0.89%



# Dynamic Levels Morning Report

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