



01 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,882	0.2 %	6.6 %
BSE SENSEX	36,068	(0.0) %	8.6 %
CNX BANK	27,231	0.3 %	11.9 %
CNX MIDCAP	17,910	0.2 %	(6.2) %
CNX SMALLCAP	6,458	0.1 %	(18.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,327	1.2 %	0.0 %
S&P 500	2,507	0.9 %	0.0 %
FTSE 100	6,728	(0.1) %	(12.0) %
HANG SENG	25,846	1.3 %	(15.3) %
NIKKEI	20,015	(0.3) %	(14.9) %
SHANGHAI COMPOSITE	2,494	0.4 %	(25.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.77	(0.8) %	9.6 %
EUR/USD	1.15	0.2 %	(4.5) %
GBP/USD	1.27	0.6 %	(5.8) %
USD/JPY	109.92	(0.7) %	(2.5) %
USD/AUD	1.42	(0.1) %	10.9 %
USD/SGD	1.36	(0.6) %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	0.6 %	(24.8) %
Gold(INR/10g)	31,566	0.1 %	7.5 %
Gold Comex(USD/oz)	1,285	0.1 %	(1.8) %
SILVER(INR/1Kg)	38,270	0.4 %	(0.9) %
Aluminium(USD/MT)	1,881	(0.9) %	(16.6) %
Copper(USD/MT)	6,018	0.5 %	(16.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	(0.0) %	0.2 %

Global Economy: China manufacturing sector fell into contraction in December with a PMI score of 49.4, the latest survey from the National Bureau of Statistics said on Monday. That's down from the no-change mark 50.0 in November, falling beneath that mark and into contraction. A score above 50 signals expansion. The bureau also said its non-manufacturing PMI climbed to 53.8, up from 53.4 in the previous month. As a result of the two scores, the bureau's composite index came in at 52.6 - down from 52.8 a month earlier.

Global Equities: Markets saw build up of optimism about a trade deal between the US and China. Presidents Trump and Xi Jinping and expressed willingness to strike a trade deal afterwards. The two leaders called a 90-day ceasefire in the trade war at the start of the month.

Indian Economy: The data on Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP) was released. The combined Index of Eight Core Industries stood at 128.5 in November, 2018, which was 3.5% higher as compared to the index of November, 2017. Its cumulative growth during April to November, 2018-19 was 5.1%. PHD Chamber of Commerce and Industry has urged the GST Council to bring in real estate within the ambit of GST, given its criticality from mass consumption point of view as also provide relief measures to industrial sectors like textile and MSME since the two are still enduring the overall negative impact of GST regime. The Reserve Bank of India (RBI) has decided to extend the liquidity benefits provided to the banks till 31 March 2019, in order to further facilitate banks to lend to NBFCs and HFCs. The banks have been permitted to reckon government securities as Level 1 HQLA under FALLCR within the mandatory SLR requirement upto 0.5% of the bank's NDTL in respect of their incremental lending to NBFCs and HFCs after October 19, 2018. This facility was available up to 31 December 2018, which is now extended to 31 March 2019.

Equity Markets: The Sensex settled with small decline on the last trading session of calendar 2018 after alternately swinging between positive and negative zone during the day. The market had logged gains in prior three trading sessions. The Sensex fell 8.39 points or 0.02% to settle at 36,068.33. The index rose 208.74 points, or 0.58% at the day's high of 36,285.46. The Nifty 50 index rose 2.65 points or 0.02% to settle at 10,862.55. The index rose 63.65 points, or 0.59% at the day's high of 10,923.55.

Corporate News: Auto stocks will be in focus as the auto companies will start announcing monthly sales numbers for December 2018 from today, 1 January 2019. HDFC has increased its retail prime lending rate (RPLR), on which its adjustable rate home loans (ARHL) are benchmarked, by 10 basis points, with effect from 1 January 2019. Pharma major Lupin announced that it has received approval from the United States Food and Drug Administration (USFDA) to market a generic version of Lundbeck Pharmaceuticals LLC's Onfi Oral Suspension, 2.5 mg/ml. The Reserve Bank of India has communicated that the applicable average base rate to be charged by Non-Banking Financial Company - Micro Finance Institutions (NBFC-MFIs) to their borrowers for the quarter beginning 1 January 2019 will be 9.15%. The base rate of NBFC-MFIs has increased from 9.02% in the previous quarter ending 31 December 2018. Goa Carbon announced that the maintenance work at the Company's Paradeep Unit located at Vill. Udayabata, Paradeepgarh, Dist. Jagatsinghpur, Orissa has been completed and the Kiln has been lit up. After preliminary heat up, feeding of raw material will commence and normal production is likely to resume from 1 January 2019.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(32.9)	25.0	(36.1)
MF(INR cr)	1,391.1	110.3	443.5

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	23,877	30,998	34,617
F&O(INR cr)	412,150	959,188	969,495

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.4	24.7	16.5
NSE VIX	16.0	16.5	15.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,160	0.1 %	11.6 %	Energy	14,335	(0.2) %	7.9 %
IT	14,440	0.4 %	13.6 %	Pharma	8,869	0.6 %	2.9 %
Metals	3,155	1.4 %	(10.9) %	Finance	11,586	(0.0) %	12.9 %
Auto	9,236	0.1 %	(16.5) %	PSU	3,088	0.3 %	8.2 %
FMCG	30,517	(0.1) %	15.2 %	Real Estate	232	(0.4) %	(21.6) %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
SAIL	56	3.1 %	(22.9) %	Avenue Sup	1,607	(2.9) %	18.4 %
JSW Steel	307	2.9 %	3.4 %	Oil India	175	(1.7) %	(23.0) %
Bandhan Ba	550	2.7 %	15.7 %	Bharti Inf	259	(1.5) %	(23.3) %
Container	688	2.6 %	10.8 %	Bharti Air	313	(1.3) %	(20.9) %
Motherson	167	2.6 %	(22.6) %	Marico	373	(1.2) %	13.7 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CBA Australia PMI Mfg (DEC F)	01-01-2019	22:00	AUD	-	53.7
CoreLogic House Px (MoM) (DEC)	01-01-2019	23:00	AUD	-	(0.009)

..... End of Report