



01 Feb.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,851	0.2 %	6.3 %
BSE SENSEX	36,257	1.9 %	9.2 %
CNX BANK	27,335	0.1 %	12.4 %
CNX MIDCAP	16,978	0.4 %	(11.1) %
CNX SMALLCAP	6,158	0.4 %	(22.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,000	(0.1) %	7.2 %
S&P 500	2,704	0.9 %	7.9 %
FTSE 100	6,969	0.4 %	3.5 %
HANG SENG	27,942	1.1 %	11.2 %
NIKKEI	20,773	1.1 %	6.2 %
SHANGHAI COMPOSITE	2,585	0.4 %	4.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.08	(0.0) %	2.4 %
EUR/USD	1.14	0.0 %	(0.1) %
GBP/USD	1.31	0.0 %	2.7 %
USD/JPY	108.88	(0.4) %	(0.7) %
USD/AUD	1.38	(0.9) %	(2.9) %
USD/SGD	1.35	(0.3) %	(1.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	(0.8) %	15.6 %
Gold(INR/10g)	33,209	0.6 %	5.3 %
Gold Comex(USD/oz)	1,318	0.0 %	2.1 %
SILVER(INR/1Kg)	40,293	0.6 %	5.3 %
Aluminium(USD/MT)	1,871	1.0 %	0.7 %
Copper(USD/MT)	6,077	1.2 %	4.1 %

**FIXED INCOME**

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

**Global Economy:** MNI Indicators said its Chicago business barometer plunged to 56.7 in January from a downwardly revised 63.8 in December. The US new home sales rose by 16.9% to an annual rate of 657,000 in November after plunging by 8.3% to a revised rate of 562,000 in October. China's official non manufacturing purchasing managers index, a measure of activity outside factory gates, rose to 54.7 in January from 53.8 in December, the National Bureau of Statistics said Thursday. Eurozone gross domestic product grew 0.2% from the third quarter, when the economy expanded at the same pace. Compared to the same period a year ago, GDP rose 1.2% in the fourth quarter after a 1.6% increase in the previous three months. For the full year 2018, GDP growth was 1.8%. Germany's seasonally adjusted number of unemployed dropped by 2,000 month-on-month in January, preliminary data from the Federal Labor Agency showed. In December, unemployment dropped by a revised 12,000. The seasonally adjusted jobless rate was a record low 5% in January, unchanged from November and December.

**Global Equities:** Stocks moved higher on Thursday as investors digested comments from the Federal Reserve's latest meeting

**Indian Economy:** GST collections have jumped to Rs 1 lakh crore in January this year from the Rs 94,726 crore collected in December last year. The Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP). The combined Index of Eight Core Industries stood at 132.1 in December, 2018, which was 2.6% higher as compared to the index of December, 2017. Its cumulative growth during April to December, 2018-19 was 4.8%. RBI noted that on a y-o-y basis, non-food bank credit increased by 12.8% in December 2018 as compared with an increase of 10% in December 2017. Credit to agriculture and allied activities expanded by 8.4% in December 2018 as compared with an increase of 9.5% in December 2017. Credit to industry rose by 4.4% in December 2018 as compared with an increase of 2.1% in December 2017. Credit growth to 'infrastructure', 'chemical and chemical products', 'all engineering', 'vehicles' and 'petroleum, coal products & nuclear fuels' accelerated. However, credit growth to 'basic metal & metal product', 'textiles', 'food processing' and 'gems & jewellery' decelerated/contracted. The President of India Ram Nath Kovind, in a speech to the joint sitting of two Houses of Parliament highlighted the impact of the "Ayushman Bharat Yojana" launched last year. In a short period of four months, more than 10 lakh poor have already availed free treatment from hospitals under this scheme, he noted.

**Equity Markets:** Key equity indices surged a day ahead of the Union Interim Budget on Friday, 1 February 2019. Positive global cues also boosted the sentiment. Risk appetite in the global stock markets improved after the US Federal Reserve left interest rates unchanged and said it would be patient with further rate hikes. Among index pivotals, Reliance Industries, HDFC twins and Infosys advanced.

**Corporate News:** Bharti Airtel's net profit fell 71.81% to Rs 86.20 crore on 0.99% increase in net sales to Rs 20,519.20 crore in Q3 December 2018 over Q3 December 2017. Hero MotoCorp's net profit fell 4.5% to Rs 769.10 crore on 7.5% increase in net sales to Rs 7,864.82 crore in Q3 December 2018 over Q3 December 2017. Power Grid Corporation of India's net profit rose 14.2% to Rs 2,331.17 crore on 12.8% increase in net sales to Rs 8,471.17 crore in Q3 December 2018 over Q3 December 2017. On a consolidated basis, Vedanta's net profit fell 21.06% to Rs 1,574 crore on 2.84% decrease in net sales to Rs 23,669 crore in Q3 December 2018 over Q3 December 2017.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	32.8	(21.1)	(35.1)
MF(INR cr)	824.3	372.5	436.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	47,030	31,618	34,296
F&O(INR cr)	1,964,632	960,210	968,468

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.6	19.6	16.8
NSE VIX	17.1	16.7	15.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,295	1.8 %	12.2 %	Energy	14,793	2.2 %	11.3 %
IT	15,499	1.6 %	22.0 %	Pharma	8,825	1.0 %	2.4 %
Metals	2,916	1.2 %	(17.6) %	Finance	11,456	1.6 %	11.6 %
Auto	8,218	1.2 %	(25.7) %	PSU	3,026	1.7 %	6.0 %
FMCG	29,801	1.1 %	12.4 %	Real Estate	229	0.9 %	(22.9) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Axis Bank	723	4.6 %	44.8 %	Yes Bank	194	(2.7) %	(36.6) %
Tata Motor	181	3.8 %	(46.6) %	Bajaj Fins	6,092	(2.5) %	15.7 %
LIC Housin	449	3.5 %	(16.8) %	Zee Entert	380	(2.2) %	(34.3) %
Tata Motor	94	3.4 %	(50.6) %	ICICI Pru	286	(2.2) %	(25.7) %
GAIL (Indi	332	3.3 %	2.3 %	Piramal En	2,032	(2.1) %	(17.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Producer Price Index (QoQ) (4Q)	01-02-2019	0:30	AUD	-	0.008
Producer Price Index (YoY) (4Q)	01-02-2019	0:30	AUD	-	0.021
Commodity Index AUD (JAN)	01-02-2019	5:30	AUD	-	121.2
RBA Commodity Index SDR (YoY) (JAN)	01-02-2019	5:30	AUD	-	0.105
MLI Leading Indicator (MoM) (DEC)	01-02-2019	13:30	CAD	-	(0.001)
RBC Canadian Manufacturing PMI (JAN)	01-02-2019	14:30	CAD	-	53.6
SECO Consumer Confidence (JAN)	01-02-2019	6:45	CHF	-	(6)
Retail Sales Real (YoY) (DEC)	01-02-2019	7:30	CHF	-	(0.005)
PMI Manufacturing (JAN)	01-02-2019	8:30	CHF	-	57.8
Caixin China PMI Mfg (JAN)	01-02-2019	1:45	CNY	-	49.7
Euro-Zone Consumer Price Index Core (YoY) (JAN A)	01-02-2019	10:00	EUR	-	0.01
Euro-Zone Consumer Price Index Estimate (YoY) (JAN)	01-02-2019	10:00	EUR	-	0.016
Markit/ ADACI Italy Manufacturing PMI (JAN)	01-02-2019	8:45	EUR	-	49.2
Markit France Manufacturing PMI (JAN F)	01-02-2019	8:50	EUR	-	51.2
Markit/BME Germany Manufacturing PMI (JAN F)	01-02-2019	8:55	EUR	-	49.9
Markit Eurozone Manufacturing PMI (JAN F)	01-02-2019	9:00	EUR	-	50.5
Markit UK PMI Manufacturing s.a. (JAN)	01-02-2019	9:30	GBP	-	54.2
Nikkei Japan PMI Manufacturing (JAN F)	01-02-2019	0:30	JPY	-	50
Vehicle Sales (YoY) (JAN)	01-02-2019	5:00	JPY	-	(0.044)
Markit Mexico PMI Mfg (JAN)	01-02-2019	15:30	MXN	-	49.7
Average Hourly Earnings (MoM) (JAN)	01-02-2019	13:30	USD	-	0.004
Average Hourly Earnings (YoY) (JAN)	01-02-2019	13:30	USD	-	0.032
Average Weekly Hours All Employees (JAN)	01-02-2019	13:30	USD	-	34.5
Change in Manufact. Payrolls (JAN)	01-02-2019	13:30	USD	-	-
Change in Non-farm Payrolls (JAN)	01-02-2019	13:30	USD	-	-
Change in Private Payrolls (JAN)	01-02-2019	13:30	USD	-	-
Labor Force Participation Rate (JAN)	01-02-2019	13:30	USD	-	0.631
Two-Month Payroll Net Revision (JAN)	01-02-2019	13:30	USD	-	-
Unemployment Rate (JAN)	01-02-2019	13:30	USD	-	0.076



Unemployment Rate (JAN)	01-02-2019	13:30	USD	-	0.039
Fed's Kaplan Speaks in Austin	01-02-2019	14:45	USD	-	-
Markit US Manufacturing PMI (JAN F)	01-02-2019	14:45	USD	-	54.9
Construction Spending (MoM) (DEC)	01-02-2019	15:00	USD	-	-
ISM Employment (JAN)	01-02-2019	15:00	USD	-	56.2
ISM Manufacturing (JAN)	01-02-2019	15:00	USD	-	54.1
ISM New Orders (JAN)	01-02-2019	15:00	USD	-	51.1
ISM Prices Paid (JAN)	01-02-2019	15:00	USD	-	54.9
U. of Mich. 1 Yr Inflation (JAN F)	01-02-2019	15:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (JAN F)	01-02-2019	15:00	USD	-	0.026
U. of Mich. Current Conditions (JAN F)	01-02-2019	15:00	USD	-	110
U. of Mich. Expectations (JAN F)	01-02-2019	15:00	USD	-	78.3
U. of Mich. Sentiment (JAN F)	01-02-2019	15:00	USD	-	90.7
Baker Hughes U.S. Rig Count (FEB 1)	01-02-2019	18:00	USD	-	1059

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