



04 Feb.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,894	0.6 %	6.7 %
BSE SENSEX	36,469	0.6 %	9.7 %
CNX BANK	27,086	(0.8) %	11.3 %
CNX MIDCAP	16,990	0.5 %	(11.0) %
CNX SMALLCAP	6,139	0.1 %	(22.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,064	0.3 %	7.4 %
S&P 500	2,707	0.1 %	8.0 %
FTSE 100	7,020	0.7 %	4.2 %
HANG SENG	27,931	(0.0) %	11.1 %
NIKKEI	20,788	0.1 %	6.3 %
SHANGHAI COMPOSITE	2,618	1.3 %	6.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.25	0.2 %	2.6 %
EUR/USD	1.15	0.1 %	0.1 %
GBP/USD	1.31	(0.1) %	2.6 %
USD/JPY	109.51	0.6 %	(0.1) %
USD/AUD	1.38	(0.1) %	(2.9) %
USD/SGD	1.35	0.2 %	(1.1) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	2.7 %	18.7 %
Gold(INR/10g)	33,262	0.2 %	5.5 %
Gold Comex(USD/oz)	1,317	(0.0) %	2.1 %
SILVER(INR/1Kg)	40,439	0.4 %	5.7 %
Aluminium(USD/MT)	1,873	(0.4) %	0.8 %
Copper(USD/MT)	6,098	(0.8) %	4.4 %

**FIXED INCOME**

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

**Global Economy:** The US nonfarm payroll employment increased by 304000 though both the unemployment rate, at 4%, and the number of unemployed persons, at 6.5 million, edged up in January. The worker participation rate rose to 63.2% - hitting highest reading since August 2013. Reflecting the end of the prolonged government shutdown, the University of Michigan released a report on Friday showing consumer sentiment in the US dropped by slightly less than initially estimated in the month of January. The consumer sentiment index for January was upwardly revised to 91.2 from the preliminary reading of 90.7. Despite the upward revision, the index is still down sharply from the final December reading of 98.3. The China Caixin/Markit Manufacturing PMI came in at 48.3 in January, compared to 49.7 in December. This was the second-consecutive month of contraction and the lowest reading since 2016. Latest survey data signalled subdued overall operating conditions in the Chinese manufacturing sector at the start of 2019. China's official manufacturing PMI came in at 49.5, rising marginally from the 49.4 reported in the previous month.

**Global Equities:** Sentiments were mixed on lingering trade tensions between US and China. US Stocks fluctuated after jobs data but ended with good gains for the week.

**Indian Economy:** Interim Union budget provided a plethora of income tax rebates for middle class and also came up with financial support schemes for farmers and unorganized laborers. The FM stated in his budget speech that individual taxpayers having taxable annual income up to Rs 5 lakhs will get full tax rebate and therefore will not be required to pay any income tax. As a result, even persons having gross income up to Rs 6.50 lakhs may not be required to pay any income tax if they make investments in provident funds, specified savings, insurance etc. The finance minister also said that the government has approved the Pradhan Mantri Kisan Samman Nidhi in effort to provide assured income support for small and marginal farmers. Under Pradhan Mantri Kisan Samman Nidhi, Rs 6,000 per year for each farmer, in three installments, to be transferred directly to farmers' bank accounts, for farmers with less than 2 hectares land holding. Finance Minister also offered Rs 3000 per month pension for workers in unorganized sector and hiked TDS threshold on interest earned on Bank/PO deposit to Rs 50000. Further on the economic front, the India Nikkei Manufacturing PMI accelerated In January.

**Equity Markets:** Domestic stocks settled with modest gains after a sharp intraday spurt as finance minister Piyush Goyal presented the interim budget 2019-20. The Nifty 50 index settled a tad below the 10,900 level. The market breadth, indicating the overall health of the market, was negative.

**Corporate News:** WTI Crude oil futures closed with a spike of 3% in a single session to end at \$55.30 per barrel - its highest level in two and half months. This can keep local OMCs shares under check. Tata Motors reported an 8% drop in domestic sales to 54,915 units in January as compared with 59,441 units in the same month last year. TVS Motor Company reported 4% increase in total sales at 2,82,630 units in January as against 2,71,801 units in the same month last year. Titan company reported net Sales at Rs 5,871.49 crore in December 2018, up 37.35%. Quarterly Net Profit came at Rs. 413.19 crore in December 2018, up 46.72%.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	387.9	(3.3)	(33.0)
MF(INR cr)	(1,200.8)	304.1	429.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	44,403	44,403	34,345
F&O(INR cr)	914,497	914,497	968,210

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.1	16.1	16.8
NSE VIX	15.7	15.7	15.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,086	(0.8) %	11.3 %	Energy	14,976	1.2 %	12.7 %
IT	15,724	1.5 %	23.7 %	Pharma	8,970	1.6 %	4.0 %
Metals	2,816	(3.4) %	(20.5) %	Finance	11,461	0.0 %	11.7 %
Auto	8,441	2.7 %	(23.7) %	PSU	2,931	(3.1) %	2.7 %
FMCG	30,200	1.3 %	14.0 %	Real Estate	231	1.2 %	(21.9) %

### 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>
Hero Motoc	2,807	7.4 %	(23.0) %	Vedanta	162	(17.8) %	(42.6) %
Piramal En	2,155	6.0 %	(12.8) %	Zee Entert	354	(6.8) %	(38.8) %
Avenue Sup	1,443	5.0 %	6.3 %	Yes Bank	186	(4.4) %	(39.4) %
Maruti Suz	6,962	4.8 %	(22.7) %	St Bk of I	284	(3.2) %	15.5 %
HCL Techno	1,044	3.8 %	6.6 %	Petronet L	221	(2.9) %	(4.2) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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