



05 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,909	(0.0) %	6.8 %
BSE SENSEX	36,583	0.3 %	10.1 %
CNX BANK	27,226	0.1 %	11.9 %
CNX MIDCAP	16,846	0.0 %	(11.8) %
CNX SMALLCAP	6,040	(0.1) %	(23.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,239	0.7 %	8.2 %
S&P 500	2,725	0.7 %	8.7 %
FTSE 100	7,027	0.1 %	4.4 %
HANG SENG	27,990	0.2 %	11.4 %
NIKKEI	20,884	0.5 %	6.8 %
SHANGHAI COMPOSITE	2,618	1.3 %	6.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.81	1.0 %	3.4 %
EUR/USD	1.14	(0.0) %	(0.1) %
GBP/USD	1.30	(0.4) %	2.3 %
USD/JPY	109.98	1.0 %	0.3 %
USD/AUD	1.39	0.5 %	(2.4) %
USD/SGD	1.35	0.3 %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(1.3) %	17.2 %
Gold(INR/10g)	33,226	(0.1) %	5.4 %
Gold Comex(USD/oz)	1,312	(0.4) %	1.6 %
SILVER(INR/1Kg)	40,158	(0.7) %	4.9 %
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	0.1 %	0.1 %

Global Economy: The Commerce Department said factory orders fell by 0.6% in November after jumping by 2.1% in October. Meanwhile, the report said durable goods orders rose by 0.7% in November after plummeting by 4.3% in October. Eurozone investor confidence weakened for a sixth straight month in February to its lowest level in over four years, survey data from Sentix showed on Monday. The investor confidence index for the euro area dropped to -3.7 from -1.5 in January, the Frankfurt-based behavioral research institute showed on Monday. UK construction growth eased further in January to its weakest level in ten months, survey data from IHS Markit showed. The headline construction Purchasing Managers' Index fell to 50.6 from 52.8 in December. The total number of building approvals issued in Australia was down a seasonally adjusted 8.4% on month in December, the Australian Bureau of Statistics said - coming in at 13,995. This followed a 9.1% decline in November.

Global Equities: Global stocks remained near two-month highs after recent bounce. Strong US jobs data made investors shrug off worries over US-China trade tensions. Chinese market is shut for a week for the Spring Festival.

Indian Economy: Fiscal deficit touched 112.4% of the full-year budget target of Rs 6.24 lakh crore at the end of December on account of lower revenue collections, government data showed on Monday. The fiscal deficit, or gap between Government's expenditure and revenue, stood at Rs 7.01 lakh crore during April-December of the current financial year which ends in March. At the end of December 2017, the deficit was 113.6% of the Budget Estimate (BE). As on 31st January, 2019, 514 sugar mills in the country have produced 185.19 lac tons of sugar, as compared to 171.23 lac tons produced by 504 mills last season on the corresponding date, according to a latest update from the Indian Sugar Mills Association (ISMA). This marks an increase of 8.15%. Micro, Small and Medium Enterprises (MSME) have supported inclusive growth and development across the country thereby reducing the regional imbalance, Minister of State (Independent Charge) for MSME, Giriraj Singh, said.

Equity Markets: Domestic stocks ended volatile trading session with modest gains, supported by firmness in index pivots Reliance Industries, TCS and HDFC. The Nifty settled above 10,900 mark. The market breadth, indicating the overall health of the market, was weak.

Corporate News: The National Company Law Appellate Tribunal turned down Tata Steel's request to consider its bid as the 'most legitimate' one for Bhushan Power & Steel. Balrampur Chini Mills on reported 96% jump in net profit at Rs 120.32 crore for December quarter, 2018-19. Total income, however, dropped to Rs 962.68 crore in the latest quarter. Coal India said that the company's board of directors has approved the buyback proposal of equity shares not exceeding 4.46 crore equity shares at Rs 235 per share for an aggregate consideration not exceeding Rs 1050 crore on a proportionate basis through the tender offer route.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	169.7	169.7	(32.0)
MF(INR cr)	(128.2)	(128.2)	426.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,537	38,470	34,336
F&O(INR cr)	608,670	761,584	966,498

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.7	15.9	16.8
NSE VIX	15.7	15.7	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,187	0.4 %	11.7 %	Energy	15,215	1.6 %	14.5 %
IT	15,755	0.2 %	24.0 %	Pharma	8,812	(1.8) %	2.2 %
Metals	2,794	(0.8) %	(21.1) %	Finance	11,493	0.3 %	12.0 %
Auto	8,396	(0.5) %	(24.1) %	PSU	2,917	(0.5) %	2.2 %
FMCG	30,009	(0.6) %	13.2 %	Real Estate	229	(1.0) %	(22.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Titan Comp	1,026	3.4 %	8.6 %	Petronet L	210	(5.0) %	(9.0) %
Reliance I	1,291	3.3 %	44.6 %	Aurobindo	764	(4.2) %	28.9 %
O N G C	146	3.1 %	(18.7) %	Indiabulls	651	(4.1) %	(47.7) %
New India	180	2.6 %	(48.8) %	Hindalco I	204	(3.4) %	(3.3) %
Aditya Bir	83	2.5 %	(45.7) %	H P C L	227	(3.2) %	(34.3) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (DEC)	05-02-2019	0:30	AUD	-	0.004
Retail Sales Ex Inflation (QoQ) (4Q)	05-02-2019	0:30	AUD	-	0.002
Trade Balance (DEC)	05-02-2019	0:30	AUD	-	-
RBA Cash Rate Target (FEB 5)	05-02-2019	3:30	AUD	-	0.015
Euro-Zone Retail Sales (MoM) (DEC)	05-02-2019	10:00	EUR	-	0.006
Euro-Zone Retail Sales (YoY) (DEC)	05-02-2019	10:00	EUR	-	0.011
Markit/ADACI Italy Composite PMI (JAN)	05-02-2019	8:45	EUR	-	50
Markit/ADACI Italy Services PMI (JAN)	05-02-2019	8:45	EUR	-	50.5
Markit France Composite PMI (JAN F)	05-02-2019	8:50	EUR	-	47.9
Markit France Services PMI (JAN F)	05-02-2019	8:50	EUR	-	47.5
Markit Germany Services PMI (JAN F)	05-02-2019	8:55	EUR	-	53.1
Markit/BME Germany Composite PMI (JAN F)	05-02-2019	8:55	EUR	-	52.1
Markit Eurozone Composite PMI (JAN F)	05-02-2019	9:00	EUR	-	50.7
Markit Eurozone Services PMI (JAN F)	05-02-2019	9:00	EUR	-	50.8
BRC Sales Like-For-Like (YoY) (JAN)	05-02-2019	0:01	GBP	-	(0.007)
New Car Registrations (YoY) (JAN)	05-02-2019	9:00	GBP	-	(0.055)
Markit/CIPS UK Composite PMI (JAN)	05-02-2019	9:30	GBP	-	51.4
Markit/CIPS UK Services PMI (JAN)	05-02-2019	9:30	GBP	-	51.2
Official Reserves (Changes) (JAN)	05-02-2019	9:30	GBP	-	-
Nikkei Japan PMI Composite (JAN)	05-02-2019	0:30	JPY	-	52
Nikkei Japan PMI Services (JAN)	05-02-2019	0:30	JPY	-	51
ANZ Commodity Price (JAN)	05-02-2019	0:00	NZD	-	(0.002)
Fed's Mester Discusses Economic Outlook and Monetary Policy	05-02-2019	0:30	USD	-	-
Markit US Composite PMI (JAN F)	05-02-2019	14:45	USD	-	54.5
Markit US Services PMI (JAN F)	05-02-2019	14:45	USD	-	54.2
ISM Non-Manufacturing/Services Composite (JAN)	05-02-2019	15:00	USD	-	57.6
U.S. to Sell USD38 Bln 3-Year Notes	05-02-2019	18:00	USD	-	-

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