



06 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,965	0.3 %	7.4 %
BSE SENSEX	36,617	0.1 %	10.4 %
CNX BANK	27,326	0.2 %	12.3 %
CNX MIDCAP	16,722	0.1 %	(12.4) %
CNX SMALLCAP	5,978	0.3 %	(24.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,412	0.7 %	8.9 %
S&P 500	2,738	0.5 %	9.2 %
FTSE 100	7,177	2.0 %	6.6 %
HANG SENG	27,990	0.2 %	11.4 %
NIKKEI	20,844	(0.2) %	6.6 %
SHANGHAI COMPOSITE	2,618	1.3 %	6.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.57	0.4 %	3.1 %
EUR/USD	1.14	(0.5) %	(0.4) %
GBP/USD	1.30	(0.9) %	1.7 %
USD/JPY	109.74	0.2 %	0.1 %
USD/AUD	1.39	1.1 %	(1.9) %
USD/SGD	1.35	0.2 %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	(1.6) %	15.3 %
Gold(INR/10g)	33,239	0.0 %	5.4 %
Gold Comex(USD/oz)	1,312	0.0 %	1.7 %
SILVER(INR/1Kg)	40,310	0.4 %	5.3 %
Aluminium(USD/MT)	1,897	3.1 %	2.1 %
Copper(USD/MT)	6,174	1.6 %	5.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	(0.0) %	0.1 %

Global Economy: The ISM said its US non-manufacturing index fell to 56.7 in January from an upwardly revised 58 in December, although a reading above 50 still indicates growth in the service sector. Eurozone retail sales decreased at the fastest pace in over seven-and-a-half years in December, preliminary data from Eurostat showed. Retail sales, excluding automobile trade, declined 1.6 percent from November, when they increased 0.8%. UK service sector growth slowed more-than-expected in January, moving closer to stagnation, as new orders and staffing levels declined amid rising cost pressures and the heightened political uncertainty linked to Brexit. The CIPS Services Purchasing Managers' Index, or PMI, dropped to 50.1 from 51.2 in December, preliminary data from IHS Markit showed. The services sector in Japan continued to expand in December, and at a stronger pace, the latest survey from Nikkei revealed on Tuesday with services PMI score of 51.6. This was up from 51.0 in November. The Reserve Bank of Australia on Tuesday decided to keep its benchmark interest rate on hold, but flagged a downgrade to growth forecast for this year amid increasing downside risks to the global growth outlook. The board of the Reserve Bank of Australia voted to maintain the cash rate at 1.50%.

Global Equities: US stocks stayed supported. Investors remained broadly concerned about growth in China while commodities witnessed some selling pressure.

Indian Economy: Business activity growth in the Indian service sector cooled further at the start of 2019, amid the weakest upturn in new work since last September. Companies continued to hire, however, with job creation at a three-month high. The seasonally adjusted Nikkei India Services Business Activity Index fell for the second straight month in January, from 53.2 in December to 52.2, indicating a softer expansion in output. The government has decided to raise an additional amount of Rs 36,000 crore through dated securities during the current financial year. As per the calendar issued previously, the last tranche for borrowing through government bonds was to complete in the week ending March 8, 2019. However, the government has now decided to borrow additional Rs 36,000 crore through two tranches of Rs 18,000 crore each during March 11-15 and March 18-22. The Finance ministry expects economic growth to accelerate to 7.5% in 2019-20.

Equity Markets: Key equity indices ended with small gains in a lackluster trading session. Most auto stocks advanced. The market breadth, indicating the overall health of the market, was weak. The barometer index, the S&P BSE Sensex, rose 34.07 points or 0.09% to settle at 36,616.81. The index hit high of 36,727.83 and low of 36,495.83 in intraday trade. The Nifty 50 index rose 22.10 points or 0.20% to settle at 10,934.35. The index hit high of 10,956.70 and low of 10,886.70 in intraday trade.

Corporate News: Hexaware Technologies has inaugurated HAPPI Lab (Hexaware Automation and Pega Process Innovation Lab), a customer experience center for digital process automation (OPA). Lupin announced the launch of Clomipramine Hydrochloride Capsules USP, 25 mg, 50 mg, and 75 mg having received an approval from the United States Food and Drug Administration (FDA) earlier. HPCL's net profit dropped 87.3% to Rs 247.55 crore on 22.06% rise in total income to Rs 77576.09 crore in Q3 December 2018 over Q3 December 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(124.9)	22.4	(32.5)
MF(INR cr)	(518.5)	(323.4)	422.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,130	36,389	34,326
F&O(INR cr)	558,363	693,844	964,563

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.6	15.8	16.8
NSE VIX	15.8	15.7	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,272	0.3 %	12.1 %	Energy	15,199	(0.1) %	14.4 %
IT	15,739	(0.1) %	23.9 %	Pharma	8,801	(0.1) %	2.1 %
Metals	2,768	(0.9) %	(21.8) %	Finance	11,520	0.2 %	12.3 %
Auto	8,468	0.9 %	(23.4) %	PSU	2,910	(0.2) %	2.0 %
FMCG	29,760	(0.8) %	12.3 %	Real Estate	224	(2.2) %	(24.4) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	365	5.1 %	(36.9) %	B H E L	59	(9.4) %	(28.6) %
Petronet L	220	4.8 %	(4.6) %	NHPC Ltd	24	(5.6) %	(14.8) %
Shriram Tr	1,068	4.2 %	(27.3) %	Bharat Ele	80	(3.6) %	(44.9) %
Titan Comp	1,067	4.0 %	13.0 %	Britannia	3,167	(3.0) %	24.0 %
UPL	796	3.2 %	5.8 %	Siemens	995	(2.8) %	(9.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA's Lowe Gives Speech in Sydney	06-02-2019	1:30	AUD	-	-
AiG Performance of Construction Index (JAN)	06-02-2019	21:30	AUD	-	42.6
Building Permits (MoM) (DEC)	06-02-2019	13:30	CAD	-	0.026
Bank of Canada Deputy Governor Timothy Lane Speech	06-02-2019	13:35	CAD	-	-
Ivey Purchasing Managers Index s.a. (JAN)	06-02-2019	15:00	CAD	-	59.7
German Factory Orders (MoM) (DEC)	06-02-2019	7:00	EUR	-	(0.01)
German Factory Orders n.s.a. (YoY) (DEC)	06-02-2019	7:00	EUR	-	(0.043)
Markit Germany Construction PMI (JAN)	06-02-2019	8:30	EUR	-	53.3
BOJ Outright Bond Purchase 5~10 Years	06-02-2019	1:10	JPY	-	-
Foreign Buying Japan Bonds (FEB 1)	06-02-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (FEB 1)	06-02-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (FEB 1)	06-02-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (FEB 1)	06-02-2019	23:50	JPY	-	-
Official Reserve Assets (JAN)	06-02-2019	23:50	JPY	-	-
Consumer Confidence Index (JAN)	06-02-2019	14:00	MXN	-	108.6
Average Hourly Earnings (QoQ) (4Q)	06-02-2019	21:45	NZD	-	0.014
Employment Change (QoQ) (4Q)	06-02-2019	21:45	NZD	-	0.011
Employment Change (YoY) (4Q)	06-02-2019	21:45	NZD	-	0.028
Labor Cost Private Sector (QoQ) (4Q)	06-02-2019	21:45	NZD	-	0.005
Participation Rate (4Q)	06-02-2019	21:45	NZD	-	0.711
Private Wages ex Overtime (QoQ) (4Q)	06-02-2019	21:45	NZD	-	0.005
Unemployment Rate (4Q)	06-02-2019	21:45	NZD	-	0.039
MBA Mortgage Applications (FEB 1)	06-02-2019	12:00	USD	-	(0.03)
Productivity Release with Limited Data Due to Shutdown	06-02-2019	13:30	USD	-	-
Trade Balance (NOV)	06-02-2019	13:30	USD	-	-
DOE Cushing OK Crude Inventory (FEB 1)	06-02-2019	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (FEB 1)	06-02-2019	15:30	USD	-	-
DOE U.S. Distillate Inventory (FEB 1)	06-02-2019	15:30	USD	-	-
DOE U.S. Gasoline Inventories (FEB 1)	06-02-2019	15:30	USD	-	-



U.S. to Sell USD50 Bln 18-Day CMB	06-02-2019	16:30	USD	-	-
U.S. to Sell USD27 Bln 10-Year Notes	06-02-2019	18:00	USD	-	-
Fed's Quarles Speaks on Bank Stress Testing	06-02-2019	23:05	USD	-	-

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