



07 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,727	0.0 %	5.0 %
BSE SENSEX	35,695	0.5 %	7.3 %
CNX BANK	27,195	0.0 %	11.8 %
CNX MIDCAP	17,637	0.0 %	(7.6) %
CNX SMALLCAP	6,382	0.0 %	(19.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,433	3.3 %	0.5 %
S&P 500	2,532	3.4 %	1.0 %
FTSE 100	6,837	2.2 %	1.5 %
HANG SENG	25,626	2.2 %	2.0 %
NIKKEI	19,562	(2.3) %	0.0 %
SHANGHAI COMPOSITE	2,515	2.1 %	2.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.73	(0.6) %	0.4 %
EUR/USD	1.14	(0.1) %	(0.5) %
GBP/USD	1.27	0.6 %	(0.2) %
USD/JPY	108.52	0.9 %	(1.0) %
USD/AUD	1.41	(1.6) %	(1.1) %
USD/SGD	1.36	0.1 %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.0 %	3.1 %
Gold(INR/10g)	31,769	(0.4) %	0.8 %
Gold Comex(USD/oz)	1,287	(0.9) %	(0.3) %
SILVER(INR/1Kg)	38,775	0.0 %	1.3 %
Aluminium(USD/MT)	1,879	3.0 %	1.1 %
Copper(USD/MT)	5,840	0.5 %	0.0 %

FIXED INCOME

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

Global Economy: The US Federal Reserve Chairman Jerome Powell stated that the central bank will be patient with monetary policy. This comforted the risky assets after recent spate of volatility. The US Labor Department said non-farm payroll employment jumped by 312,000 jobs in December after climbing by an upwardly revised 176,000 jobs in November. The report also said the unemployment rate rose to 3.9% in December from 3.7% in November. However, the unexpected uptick by the unemployment rate came as the labor force jumped by 419,000 people compared to a much more modest 142,000-person increase in the household survey measure of employment. The average hourly employee earnings climbed by 11 cents to \$27.48 in December, marking a 3.2% increase compared to the same month a year ago. The annual rate of growth in average hourly employee earnings also accelerated from the 3.1% increase seen in November, reaching its highest level since April of 2009. China's service sector growth hit a six-month high in December amid greater demand from abroad, leading to faster private sector expansion, survey results from IHS Markit showed on Friday. The headline seasonally adjusted Caixin services Purchasing Managers' Index rose slightly to 53.9 from 53.8 in November. Eurozone's consumer price inflation eased in December to its lowest level in eight months. The consumer price index rose 1.6% year-on-year following a 1.9% gain in November. Core inflation, which excludes prices of energy, food, alcohol & tobacco, was 1% in December, unchanged from November.

Global Equities: US stocks witnessed a sharp rebound on Friday following their recent tumble. Strong labor market data and bargain buying lifted sentiments. Rising oil prices also talks of a renewed dialogue on the trade front with China also supported the indices.

Indian Economy: India's seasonally adjusted Nikkei Services Business Activity index fell to 53.2 in December, from 53.7 in November, amid softer growth of activity and new business, a monthly survey said on Friday. Despite easing marginally, the services PMI was in the expansion territory for the seventh straight month. The seasonally adjusted Nikkei India Composite PMI Output Index, was down from a 25-month high of 54.5 in November to 53.6 at December. The total net indirect tax collection (inclusive of CGST, IGST and GST-Compensation Cess) in the current financial year during April-November, 2018-19 is Rs. 6,12,653.47 crore. The Budget Estimate(BE) for indirect taxes revenue (inclusive of CGST, IGST and GST-Compensation Cess) for FY 2018-19 has been fixed at Rs. 11,16,000 crore.

Equity Markets: Domestic stocks snapped two-day fall to register modest gains on last trading day of the week. The barometer index, the S&P BSE Sensex, rose 181.39 points or 0.51% to settle at 35,695.10. The Nifty 50 index rose 55.10 points or 0.52% to settle at 10,727.35. IT stocks declined. The S&P BSE Mid-Cap index rose 0.48%. The S&P BSE Small-Cap index rose 0.14%.

Corporate News: Bharat Heavy Electricals (Bhel) created a new benchmark of successfully commissioning a 800 MW thermal unit within a record time of 46 months. This is a marked improvement over the time taken in commissioning of 800 MW sets till date in the country by various developers. Following the successful commissioning in record time by Bhel, the power plant has attained commercial operation. Kirloskar Electric Company has entered into an agreement with Brigade Enterprises for sale of non-core asset of the company situated at Subramanyanagar, Industrial Suburb, Rajajinagar, Bangalore admeasuring 1.065 acres (46,391 sq.ft.). The Indian Rupee extended gains on Friday and rebounded by 48 paise to settle at 69.72 against the US dollar in line with good gains in local equities and uptrend in other emerging market currencies. This could keep the IT stocks in focus.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(150.3)	(48.4)	(36.9)
MF(INR cr)	439.0	390.3	443.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	30,258	27,616	34,469
F&O(INR cr)	687,036	1,069,015	971,601

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.4	23.4	16.6
NSE VIX	16.2	16.2	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	27,195	0.9 %	11.8 %	Energy	14,043	0.9 %	5.7 %
IT	14,146	(1.2) %	11.3 %	Pharma	8,788	0.8 %	1.9 %
Metals	3,002	1.4 %	(15.2) %	Finance	11,572	1.0 %	12.8 %
Auto	8,809	0.5 %	(20.3) %	PSU	3,125	2.3 %	9.5 %
FMCG	30,190	0.0 %	13.9 %	Real Estate	236	0.8 %	(20.4) %

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>
Bharti Inf	285	5.0 %	(15.6) %	Petronet L	221	(3.5) %	(4.3) %
LIC Housin	488	3.8 %	(9.5) %	United Spi	605	(2.5) %	(7.5) %
Bharat Ele	92	3.4 %	(36.5) %	HCL Techno	932	(1.7) %	(4.8) %
Piramal En	2,359	3.2 %	(4.6) %	Motherson	159	(1.6) %	(26.4) %
Yes Bank	190	3.0 %	(38.1) %	Tech Mahin	681	(1.5) %	6.4 %

EVENTS CALENDAR

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

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