



07 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,062	0.0 %	8.3 %
BSE SENSEX	36,975	1.0 %	11.2 %
CNX BANK	27,402	0.0 %	12.6 %
CNX MIDCAP	16,721	0.0 %	(12.4) %
CNX SMALLCAP	5,988	0.0 %	(24.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,390	(0.1) %	8.8 %
S&P 500	2,732	(0.2) %	9.0 %
FTSE 100	7,173	(0.1) %	6.5 %
HANG SENG	27,990	0.2 %	11.4 %
NIKKEI	20,874	0.1 %	6.7 %
SHANGHAI COMPOSITE	2,618	1.3 %	6.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.56	(0.3) %	3.1 %
EUR/USD	1.14	(0.7) %	(0.8) %
GBP/USD	1.29	(0.9) %	1.4 %
USD/JPY	109.78	(0.2) %	0.1 %
USD/AUD	1.41	1.5 %	(0.9) %
USD/SGD	1.36	0.3 %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	13.6 %	33.2 %
Gold(INR/10g)	33,210	(0.1) %	5.3 %
Gold Comex(USD/oz)	1,312	0.0 %	1.7 %
SILVER(INR/1Kg)	40,028	(0.7) %	4.6 %
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 US Commerce Department said the trade deficit narrowed to \$49.3 billion in November from a revised \$55.7 billion in October. Germany's factory orders decreased for a second straight month in December following weak demand from abroad. Manufacturing orders decreased a calendar and seasonally adjusted 1.6% from the previous month, preliminary data from the Federal Statistical Office showed on Wednesday. The latest fall was the most since June last year. Domestic orders fell 0.6% and foreign orders dropped 2.3% in December on the previous month.

Global Equities: US stocks saw tepid moves after recent gains while some losses emerged in European markets.

Indian Economy: The Reserve Bank released the quarterly house price index (HPI) (base: 2010-11=100) for Q2 of 2018-19, based on transactions data received from housing registration authorities in ten major cities (viz., Mumbai, Delhi, Chennai, Kolkata, Bengaluru, Lucknow, Ahmedabad, Jaipur, Kanpur and Kochi). The All-India HPI recorded a sequential increase of 0.8% in Q2 of 2018-19 over Q1 of 2018-19. City-wise, large variance was observed, with Chennai recording the highest rise 6.2% and Kanpur recording the maximum contraction (-) 5.6%. On a year-on-year basis, the all-India HPI recorded a growth of 5.7% in Q2 of 2018-19 as against 5.3% in the previous quarter and 7.4% a year ago.

Equity Markets: Domestic stocks rose for a fifth straight session on Wednesday, led by gains in Reliance Industries, ICICI Bank and Infosys. The Sensex ended below the psychologically important 37,000 mark after crossing that level in late trade. The Nifty settled above the psychologically important 11,000 mark after crossing that level in early trade.

Corporate News: Banks would be in focus ahead of the outcome of central bank policy meeting. The resolution of the Reserve Bank of India (RBI)'s Monetary Policy Committee (MPC) will be placed on the RBI website in morning today. GAIL (India) has offloaded the pipe laying contract from IL&FS due to poor project progress driven on account of acute financial crisis. The Bokaro – Durgapur section (124 kms) is now re-tendered and awarded to three different contractors to expedite construction efforts for hooking up supply network to the fertilizer, city gas distribution and other industrial consumers. : Dalmia-OCL, the refractories business of Dalmia Bharat Group, announced its first ever overseas acquisition of GSB Group GmbH - a German specialty refractory maker.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	99.6	48.1	(31.8)
MF(INR cr)	(430.8)	(279.5)	422.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,242	36,852	34,344
F&O(INR cr)	650,160	682,923	963,080

MARKET VOLATILITY

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

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,402	0.5 %	12.6 %	Energy	15,394	1.3 %	15.8 %
IT	16,056	2.0 %	26.4 %	Pharma	8,907	1.2 %	3.3 %
Metals	2,833	2.3 %	(20.0) %	Finance	11,610	0.8 %	13.1 %
Auto	8,567	1.2 %	(22.5) %	PSU	2,952	1.4 %	3.4 %
FMCG	30,029	0.9 %	13.3 %	Real Estate	225	0.5 %	(24.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tech Mahin	811	8.0 %	26.7 %	Adani Port	330	(2.8) %	(10.6) %
Zee Entert	388	6.2 %	(33.0) %	General In	241	(2.4) %	(34.7) %
Bandhan Ba	440	5.7 %	(7.4) %	Biocon	635	(2.3) %	6.0 %
Cipla	535	5.3 %	(7.2) %	HDFC Life	370	(1.8) %	(23.4) %
Tata Steel	485	4.4 %	(16.2) %	Vodafone I	30	(1.5) %	(61.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Confidence (4Q)	07-02-2019	0:30	AUD	-	3
Foreign Reserves (Australian dollar) (JAN)	07-02-2019	5:30	AUD	-	-
UBS Real Estate Bubble Index (4Q)	07-02-2019	7:00	CHF	-	0.87
Foreign Currency Reserves (JAN)	07-02-2019	8:00	CHF	-	-
European Commission publishes Economic Forecasts	07-02-2019	10:00	EUR	-	-
ECB's Mersch Speaks in Brussels	07-02-2019	12:15	EUR	-	-
German Industrial Production n.s.a. and w.d.a. (YoY) (DEC)	07-02-2019	7:00	EUR	-	(0.047)
German Industrial Production s.a. (MoM) (DEC)	07-02-2019	7:00	EUR	-	(0.019)
ECB Publishes Economic Bulletin	07-02-2019	9:00	EUR	-	-
Bank of England Bank Rate (FEB 7)	07-02-2019	12:00	GBP	-	0.0075
Bank of England Inflation Report	07-02-2019	12:00	GBP	-	-
BOE Asset Purchase Target (FEB)	07-02-2019	12:00	GBP	-	-
BOE Corporate Bond Target (FEB)	07-02-2019	12:00	GBP	-	-
Halifax House Price 3Mths/Year (JAN)	07-02-2019	8:30	GBP	-	0.013
Halifax House Prices (MoM) (JAN)	07-02-2019	8:30	GBP	-	0.022
Tokyo Avg Office Vacancies (JAN)	07-02-2019	2:00	JPY	-	1.88
Overall Household Spending (YoY) (DEC)	07-02-2019	23:30	JPY	-	(0.006)
Adjusted Current Account Total (Yen) (DEC P)	07-02-2019	23:50	JPY	-	-
Bank Lending Ex-Trusts (YoY) (JAN)	07-02-2019	23:50	JPY	-	0.025
Bank Lending incl Trusts (YoY) (JAN)	07-02-2019	23:50	JPY	-	0.024
BoP Current Account Balance (DEC)	07-02-2019	23:50	JPY	-	-
Housing Loans (YoY) (4Q)	07-02-2019	23:50	JPY	-	0.024
Trade Balance - BOP Basis (Yen) (DEC P)	07-02-2019	23:50	JPY	-	-
Coincident Index (DEC P)	07-02-2019	5:00	JPY	-	102.9
Leading Index CI (DEC P)	07-02-2019	5:00	JPY	-	99.1
Bi-Weekly Core CPI (JAN 31)	07-02-2019	14:00	MXN	-	0.0008
Bi-Weekly CPI (JAN 31)	07-02-2019	14:00	MXN	-	0.0011
Bi-Weekly CPI (YoY) (JAN 31)	07-02-2019	14:00	MXN	-	0.0452
CPI (YoY) (JAN 31)	07-02-2019	14:00	MXN	-	0.007



CPI (YoY) (JAN)	07-02-2019	14:00	MXN	-	0.0483
CPI Core (MoM) (JAN)	07-02-2019	14:00	MXN	-	0.0047
Overnight Rate (FEB 7)	07-02-2019	19:00	MXN	-	0.0825
Fed Chairman Powell to Host Town Hall Meeting with Educators	07-02-2019	0:00	USD	-	-
Continuing Claims (JAN 26)	07-02-2019	13:30	USD	-	-
Initial Jobless Claims (FEB 2)	07-02-2019	13:30	USD	-	-
Fed's Kaplan Speaks in Dallas	07-02-2019	14:15	USD	-	-
Fed's Clarida Discusses Paper on Global Factor in Neutral Rate	07-02-2019	14:30	USD	-	-
EIA Natural Gas Storage Change (FEB 1)	07-02-2019	15:30	USD	-	(173)
EIA Working Natural Gas Implied Flow (FEB 1)	07-02-2019	15:30	USD	-	(173)
U.S. to Sell 4-Week Bills	07-02-2019	16:30	USD	-	-
U.S. to Sell 8-Week Bills	07-02-2019	16:30	USD	-	-
U.S. to Sell USD19 Bln 30-Year Bonds	07-02-2019	18:00	USD	-	-
Consumer Credit (DEC)	07-02-2019	20:00	USD	-	-

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