



08 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,790	0.2 %	5.7 %
BSE SENSEX	35,850	0.4 %	8.0 %
CNX BANK	27,305	0.0 %	12.2 %
CNX MIDCAP	17,658	0.0 %	(7.5) %
CNX SMALLCAP	6,387	0.0 %	(19.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,531	0.4 %	0.9 %
S&P 500	2,550	0.7 %	1.7 %
FTSE 100	6,811	(0.4) %	1.1 %
HANG SENG	25,836	0.8 %	2.8 %
NIKKEI	20,039	2.4 %	2.4 %
SHANGHAI COMPOSITE	2,533	0.7 %	2.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.68	(0.7) %	0.4 %
EUR/USD	1.14	0.3 %	(0.0) %
GBP/USD	1.28	1.0 %	0.2 %
USD/JPY	108.62	1.0 %	(0.9) %
USD/AUD	1.40	(2.0) %	(1.4) %
USD/SGD	1.36	(0.4) %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	1.2 %	4.3 %
Gold(INR/10g)	31,764	(0.0) %	0.7 %
Gold Comex(USD/oz)	1,287	0.0 %	(0.3) %
SILVER(INR/1Kg)	38,878	0.3 %	1.6 %
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	0.0 %	0.1 %

Global Economy: Worldwide semiconductor revenue totalled US\$ 476.7 billion in 2018, a 13.4% increase from 2017, according to preliminary results by Gartner. A report released by the Institute for Supply Management on Monday showed growth in US service sector activity slowed by more than anticipated in the month of December. The ISM said its non-manufacturing index eased to 57.6 in December after inching up to 60.7 in November. The Eurozone retail sales grew for a second straight month. Retail sales rose a seasonally adjusted 0.6% from October, when sales increased at the same pace. Eurozone investor confidence dropped to -1.5 in January from -0.3 last month, marking the lowest level since December 2014, survey data from the behavioral research institute Sentix showed. The current situation index dropped for a fifth month running, to 18, which was lowest level since January 2017. German factory orders decreased a calendar and seasonally adjusted 1% in November from a growth of 0.2% in October, revised from 0.3% reported earlier. The latest fall was the most severe since a 3.6% slump in June. Japan services sector continued to expand in December, with a PMI score of 51.0, the latest survey from Nikkei revealed. That's down from 52.3 in November, although it remains above the boom-of-bust line of 50 that separates expansion from contraction. Nikkei also said its composite index slipped to a reading of 52.0 in December, down from 52.4 in the previous month.

Global Equities: Investor sentiment picked up slightly ahead of a round of trade negotiations between the United States and China in Beijing. The US and China will hold vice ministerial level trade talks in Beijing on January 7-8, according to the Chinese commerce ministry. Stocks slipped in Europe on poor economic data and lack of buying support.

Indian Economy: The Central Statistics Office (CSO), Ministry of Statistics and Programme Implementation has released the First Advance Estimates of National Income at Constant (2011-12) and Current Prices, for the financial year 2018-19. The advance estimates shows India's GDP would grow 7.2% in 2018-19, showing acceleration from 6.7% growth in 2017-18. Real GVA, i.e, GVA at Basic Constant Prices (2011-12) is anticipated to increase 7.0% in 2018-19 up from 6.5% growth in 2017-18. The provisional figures of Direct Tax collections up to December, 2018 show that gross collections are at Rs 8.74 lakh crore which is 14.1% higher than the gross collections for the corresponding period of last year. The total acreage under rabi crops stood at 564.42 lakh ha as on 4th January 2019 as compared to 584.37 lakh ha an year ago - recording a drop of around 3.40%.

Equity Markets: Domestic stocks ended with modest gains, mirroring strength in global stock markets, supported by strong US jobs data and a dovish tone by the US Federal Reserve. The Sensex settled below 36,000 mark after crossing that level in morning trade. The barometer index, the S&P BSE Sensex, rose 155.06 points or 0.43% to settle at 35,850.16. The Nifty 50 index rose 49.25 points or 0.46% to settle at 10,776.60.

Corporate News: Tata Consultancy Services announced that the Central Bank of Kuwait (CBK) is now operational on TCS BaNCS, its flagship banking platform. Real estate stocks could be in focus. Implementation of regulatory reforms such as RERA and GST has had a positive impact on the residential market with the top three cities of Bengaluru, Mumbai and Delhi-NCR showing signs of recovery in 2018. While Bengaluru and Mumbai recorded 81% and 22% annual growth respectively, Delhi NCR led with 71% year-on-year growth in sales, According to JLL Research. Lupin has received approval for its Lurasidone Hydrochloride Tablets, 20 mg, 40 mg, 60 mg, 80 mg & 120 mg from the United States Food and Drug Administration (FDA) to market a generic version of Sunovion Pharmaceuticals, Inc's Latuda Tablets, 20 mg, 40 mg, 60 mg, 80 mg, and 120 mg.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(58.6)	(51.0)	(37.0)
MF(INR cr)	479.9	412.7	443.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,873	27,467	34,429
F&O(INR cr)	549,827	965,177	969,381

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.4	22.9	16.6
NSE VIX	16.3	16.2	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,305	0.4 %	12.2 %	Energy	14,137	0.7 %	6.4 %
IT	14,292	1.0 %	12.5 %	Pharma	8,733	(0.6) %	1.3 %
Metals	2,997	(0.2) %	(15.3) %	Finance	11,592	0.2 %	13.0 %
Auto	8,820	0.1 %	(20.2) %	PSU	3,109	(0.5) %	8.9 %
FMCG	30,283	0.3 %	14.3 %	Real Estate	239	1.3 %	(19.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharti Inf	294	3.1 %	(13.0) %	Bandhan Ba	498	(5.8) %	4.7 %
Axis Bank	637	2.9 %	27.7 %	Indiabulls	794	(4.3) %	(36.2) %
DLF	180	2.7 %	(10.5) %	Ashok Leyl	93	(3.5) %	(36.9) %
Tata Motor	94	2.6 %	(50.4) %	Piramal En	2,280	(3.4) %	(7.8) %
Tata Motor	175	2.6 %	(48.3) %	Bajaj Auto	2,659	(2.8) %	(5.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ANZ Job Advertisements (MoM) (DEC)	08-01-2019	00:30	AUD	-	(0.003)
Trade Balance (NOV)	08-01-2019	00:30	AUD	-	-
Foreign Reserves (Australian Dollar) (DEC)	08-01-2019	05:30	AUD	-	-
AiG Performance of Service Index (DEC)	08-01-2019	21:30	AUD	-	55.1
International Merchandise Trade (Canadian Dollar) (NOV)	08-01-2019	13:30	CAD	-	-
Retail Sales Real (YoY) (NOV)	08-01-2019	07:30	CHF	-	0.008
German Industrial Production n.s.a. and w.d.a. (YoY) (NOV)	08-01-2019	07:00	EUR	-	0.016
German Industrial Production s.a. (MoM) (NOV)	08-01-2019	07:00	EUR	-	(0.005)
Euro-Zone Business Climate Indicator (DEC)	08-01-2019	10:00	EUR	-	1.09
Euro-Zone Consumer Confidence (DEC F)	08-01-2019	10:00	EUR	-	(6.2)
Euro-Zone Economic Confidence (DEC)	08-01-2019	10:00	EUR	-	109.5
Euro-Zone Industrial Confidence (DEC)	08-01-2019	10:00	EUR	-	3.4
Euro-Zone Services Confidence (DEC)	08-01-2019	10:00	EUR	-	13.3
Halifax House Price 3Mths/Year (DEC)	08-01-2019	08:30	GBP	-	0.003
Halifax House Prices (MoM) (DEC)	08-01-2019	08:30	GBP	-	(0.014)
Consumer Confidence Index (DEC)	08-01-2019	05:00	JPY	-	42.9
ANZ Job Advertisements (MoM) (DEC)	08-01-2019	21:00	NZD	-	(0.001)
NFIB Small Business Optimism (DEC)	08-01-2019	11:00	USD	-	104.8
Trade Balance (NOV)	08-01-2019	13:30	USD	-	-
JOLTS Job Openings (NOV)	08-01-2019	15:00	USD	-	7079
U.S. to Sell USD38 Bln 3-Year Notes	08-01-2019	18:00	USD	-	-
Consumer Credit (NOV)	08-01-2019	20:00	USD	-	-

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