



09 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,802	0.0 %	5.8 %
BSE SENSEX	35,981	0.4 %	8.6 %
CNX BANK	27,510	0.0 %	13.1 %
CNX MIDCAP	17,634	0.0 %	(7.7) %
CNX SMALLCAP	6,403	0.0 %	(19.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,787	1.1 %	2.0 %
S&P 500	2,574	1.0 %	2.7 %
FTSE 100	6,862	0.7 %	1.9 %
HANG SENG	25,875	0.2 %	3.0 %
NIKKEI	20,204	0.8 %	3.3 %
SHANGHAI COMPOSITE	2,526	(0.3) %	2.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.20	0.7 %	1.1 %
EUR/USD	1.15	0.5 %	0.0 %
GBP/USD	1.27	0.1 %	(0.1) %
USD/JPY	108.85	0.3 %	(0.7) %
USD/AUD	1.40	(0.6) %	(1.7) %
USD/SGD	1.36	(0.5) %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	2.6 %	7.0 %
Gold(INR/10g)	31,734	(0.1) %	0.6 %
Gold Comex(USD/oz)	1,286	(0.1) %	(0.4) %
SILVER(INR/1Kg)	38,693	(0.5) %	1.1 %
Aluminium(USD/MT)	1,858	(1.1) %	0.0 %
Copper(USD/MT)	5,890	0.8 %	0.9 %

FIXED INCOME

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

Global Economy: Eurozone's economic sentiment fell in December to its lowest level since the start of 2017, survey data from the European Commission showed on Tuesday. The economic sentiment index dropped to 107.3 from 109.5 in November. The Eurozone economic sentiment has weakened steadily since December 2017. The survey also showed that consumer confidence fell to -6.2 in December from -3.9 in November. The reading was the weakest since February 2017. German industrial production fell a calendar and seasonally adjusted 1.9% in November from October, when it decreased 0.8%, revised from 0.5%, preliminary data from the Federal Statistical Office showed. Output decreased for a third straight month in November, amid a sharp fall in consumer goods and energy output. Germany's manufacturing new orders decreased for the first time in four months in November. Factory orders decreased a calendar and seasonally adjusted 1% from October, when they grew 0.2%, revised from 0.3% reported earlier. German retail sales rose a calendar and seasonally adjusted 1.4% from October, when they edged up 0.1%, revised from a 0.3% drop. Japan's consumer confidence weakened for a third consecutive month in December. The consumer confidence index for households with two or more persons fell to a seasonally adjusted 42.7 from 42.9 in November. Australia had a seasonally adjusted merchandise trade surplus of A\$1.925 billion in November, down from A\$2.316 billion in October. Exports rose A\$532 million (1%) to A\$38.445 billion while imports rose A\$620 million (2%) to A\$36.520 billion.

Global Equities: Sentiments were mostly supported though the economic data across the globe indicated that the undertone remains moderate.

Indian Economy: The Assets under Management (AUM) of the mutual fund (MF) industry declined by 4.9% (or by Rs 1.17 lakh crore) to Rs 22.86 lakh crore in December 2018 over November 2018. AUM of the industry grew by 7.5% rise (by Rs 1.59 lakh crore) in December 2018 compared with December 2017. Net outflow in the industry stood at Rs 1.37 lakh crore in December 2018, against net inflows of Rs 1.42 lakh crore in November 2018 and net outflows of Rs 1.75 lakh crore in December 2017. The Liquid / Money Market Funds saw highest outflows, while other ETF Funds registered highest inflows. The Federation of Automobile Dealers Associations (FADA) released the Monthly Vehicle Registration Data for the month of December 2018. The two-wheelers (2W) registration were up by +11% to 11.41 lakh. The passenger vehicles (PV) registration were down by -3% to 2.03 lakh in December 2018 over December 2017. For the current financial year up to 31 December 2018, 2W registration were up by +5% to 110.71 lakh, while PV registration declined 2% to 19.18 lakh.

Equity Markets: The local equity indices extended gains for third straight trading session led by gains in index pivots. The Sensex ended below 36,000 mark after crossing that level in intraday trade. Trading was volatile though as after opening lower, key indices bounced back and hit fresh intraday high in morning trade before slipped into negative terrain. Market firmed up once again in late trades as buying momentum stayed supportive.

Corporate News: NMDC board approved the proposal to buyback of not exceeding 10,20,40,815 equity shares (representing 3.23% of the total number of equity shares in the paid-up share capital of the company) at Rs 98 per equity share for an aggregate consideration not exceeding Rs 1000 crore from all the equity shareholders of the company, as on the record date, on a proportionate basis through a tender offer route. IndusInd Bank will declare its Q3 December 2018 results today, 9 January 2019. Tata Steel said that standalone steel production was marginally up in Q3 December 2018 over Q3 December 2017 with steady plant utilization. Sales volume was lower due to seasonal headwinds, particularly in terms of softer Automotive demand, and inventory replenishment.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	43.8	(32.0)	(36.6)
MF(INR cr)	(66.3)	320.2	441.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,589	27,654	34,398
F&O(INR cr)	728,442	925,721	968,120

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.5	22.4	16.6
NSE VIX	15.7	16.1	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,510	0.8 %	13.1 %	Energy	14,106	(0.2) %	6.1 %
IT	14,286	(0.0) %	12.4 %	Pharma	8,865	1.5 %	2.8 %
Metals	3,010	0.4 %	(15.0) %	Finance	11,635	0.4 %	13.4 %
Auto	8,860	0.4 %	(19.9) %	PSU	3,195	2.8 %	11.9 %
FMCG	30,272	(0.0) %	14.2 %	Real Estate	239	(0.0) %	(19.4) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun Pharma	448	4.0 %	(11.8) %	Bandhan Ba	477	(4.2) %	0.3 %
ICICI Bank	380	3.4 %	45.2 %	Havells In	670	(3.4) %	31.9 %
St Bk of I	305	3.0 %	24.0 %	Godrej Con	779	(2.6) %	4.8 %
Aurobindo	747	3.0 %	26.0 %	Zee Entert	452	(2.4) %	(22.0) %
Yes Bank	192	2.8 %	(37.2) %	Britannia	3,090	(1.7) %	21.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (NOV)	09-01-2019	00:30	AUD	-	(0.015)
Building Approvals (YoY) (NOV)	09-01-2019	00:30	AUD	-	(0.134)
Job Vacancies (NOV)	09-01-2019	00:30	AUD	-	0.006
Housing Starts (DEC)	09-01-2019	13:15	CAD	-	-
Bank of Canada Rate Decision (JAN 9)	09-01-2019	15:00	CAD	-	0.0175
SNB Posts Preliminary Result	09-01-2019	06:25	CHF	-	-
Consumer Price Index (MoM) (DEC)	09-01-2019	07:30	CHF	-	(0.003)
Consumer Price Index (YoY) (DEC)	09-01-2019	07:30	CHF	-	0.009
Consumer Price Index Core (YoY) (DEC)	09-01-2019	07:30	CHF	-	0.002
Consumer Price Index EU Harmonized (MoM) (DEC)	09-01-2019	07:30	CHF	-	(0.004)
Consumer Price Index EU Harmonized (YoY) (DEC)	09-01-2019	07:30	CHF	-	0.01
German Current Account (euros) (NOV)	09-01-2019	07:00	EUR	-	-
German Exports s.a. (MoM) (NOV)	09-01-2019	07:00	EUR	-	0.007
German Imports s.a. (MoM) (NOV)	09-01-2019	07:00	EUR	-	0.013
German Trade Balance (NOV)	09-01-2019	07:00	EUR	-	-
Euro-Zone Unemployment Rate (NOV)	09-01-2019	10:00	EUR	-	0.081
BOE Governor Carney Participates in Online Q&A	09-01-2019	15:30	GBP	-	-
Labor Cash Earnings (YoY) (NOV)	09-01-2019	00:00	JPY	-	0.015
Real Cash Earnings (YoY) (NOV)	09-01-2019	00:00	JPY	-	(0.001)
BOJ Outright Bond Purchase 5~10 Years	09-01-2019	01:10	JPY	-	-
Foreign Buying Japan Bonds (JAN 4)	09-01-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JAN 4)	09-01-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JAN 4)	09-01-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JAN 4)	09-01-2019	23:50	JPY	-	-
Official Reserve Assets (DEC)	09-01-2019	23:50	JPY	-	-
Bi-Weekly Consumer Price Index (DEC 31)	09-01-2019	14:00	MXN	-	0.0056
Bi-Weekly Consumer Price Index (YoY) (DEC 31)	09-01-2019	14:00	MXN	-	0.05
Bi-Weekly Core Consumer Price Index (DEC 31)	09-01-2019	14:00	MXN	-	0.0042
Consumer Price Index (MoM) (DEC)	09-01-2019	14:00	MXN	-	0.0087



Consumer Price Index (YoY) (DEC)	09-01-2019	14:00	MXN	-	0.0472
Consumer Price Index Core (MoM) (DEC)	09-01-2019	14:00	MXN	-	0.0025
ANZ Commodity Price (JAN)	09-01-2019	00:00	NZD	-	(0.006)
ANZ Truckometer Heavy (MoM) (JAN)	09-01-2019	21:00	NZD	-	(0.019)
MBA Mortgage Applications (JAN 4)	09-01-2019	12:00	USD	-	(0.085)
Fed's Bostic Speaks in Chattanooga on Economic Outlook	09-01-2019	13:20	USD	-	-
Fed's Evans Speaks on Economy and Monetary Policy	09-01-2019	14:00	USD	-	-
DOE Cushing OK Crude Inventory (JAN 4)	09-01-2019	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 4)	09-01-2019	15:30	USD	-	-
DOE U.S. Distillate Inventory (JAN 4)	09-01-2019	15:30	USD	-	-
DOE U.S. Gasoline Inventories (JAN 4)	09-01-2019	15:30	USD	-	-
Fed's Rosengren Speaks on the Economic Outlook	09-01-2019	16:30	USD	-	-
U.S. to Sell USD24 Bln 10-Year Notes Reopening	09-01-2019	18:00	USD	-	-
FOMC Meeting Minutes (DEC 19)	09-01-2019	19:00	USD	-	-

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