



11 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,835	0.1 %	6.1 %
BSE SENSEX	36,107	(0.3) %	8.8 %
CNX BANK	27,603	0.3 %	13.5 %
CNX MIDCAP	17,711	0.1 %	(7.3) %
CNX SMALLCAP	6,428	0.2 %	(18.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,002	0.5 %	2.9 %
S&P 500	2,597	0.5 %	3.6 %
FTSE 100	6,943	0.5 %	3.1 %
HANG SENG	26,521	0.2 %	5.5 %
NIKKEI	20,164	(1.3) %	3.1 %
SHANGHAI COMPOSITE	2,535	(0.4) %	2.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.36	0.2 %	1.3 %
EUR/USD	1.15	0.7 %	0.7 %
GBP/USD	1.28	0.2 %	0.1 %
USD/JPY	108.34	(0.5) %	(1.2) %
USD/AUD	1.39	(0.6) %	(2.3) %
USD/SGD	1.35	(0.5) %	(1.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.5 %	13.1 %
Gold(INR/10g)	32,116	0.8 %	1.9 %
Gold Comex(USD/oz)	1,291	(0.4) %	(0.0) %
SILVER(INR/1Kg)	39,177	0.8 %	2.4 %
Aluminium(USD/MT)	1,842	0.3 %	(0.9) %
Copper(USD/MT)	5,964	1.0 %	2.1 %

FIXED INCOME

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

Global Economy: The US initial jobless claims fell to 216,000, a decrease of 17,000 from the previous week's revised level of 233,000. Meanwhile, the Labor Department said the less volatile four-week moving average rose to 221,750, an increase of 2,500 from the previous week's revised average of 219,250. China consumer prices were up 1.9% on year in December, the National Bureau of Statistics said on Thursday, down from 2.2% in November. The bureau also said that producer prices were up an annual 0.9%, down sharply from 2.7% in the previous month. The Chinese Ministry of Commerce (MOFCOM) said in a statement that the US and China had broad and detailed discussion on trade and structural issues of shared concern. The talks have strengthened mutual understanding and laid the foundation for addressing both sides' concerns, adding that the two countries also agreed to keep close contact. Global food prices held broadly stable in December, with rising international cereal prices offsetting declining sugar and dairy quotations, the Food and Agriculture Organization of the United Nations (FAO) said. The FAO Food Price Index averaged 161.7 points in December, compared to a revised level of 161.6 points in the previous month. The index, which serves as an indicator of the monthly change in the international prices of a basket of food commodities, averaged 168.4 points for the whole of 2018, some 3.5% lower than in 2017 and almost 27% below the high point reached in 2011. Japan's leading economic index dropped to a two-year low in November. The composite leading index fell to 99.3 in November from 99.6 in October.

Global Equities: The rally in risky assets paused as sentiments turned lax yesterday. The attention shifted from the China-US trade talks to the recent array of weak economic releases around the globe.

Indian Economy: The threshold for the GST registration has been raised for businesses with an annual turnover of Rs 50 lakh. A committee has been set up to consider real estate GST rates and the exemption limit for MSMEs has been raised to Rs 40 lakh of annual turnover. India Inc. is optimistic on the prospects for the growth of the economy in the next 12 months, foresees faster sectoral growth and expects future growth to be driven by export demand. This prognosis is held out by the FICCI-PwC India Manufacturing Barometer 2019: Building Export Competitiveness. Union Minister of Commerce & Industry and Civil Aviation, Suresh Prabhu, highlighted the declining trend of export credit in recent months and suggested that banks may be asked to encourage flow of credit to the export sector particularly to MSMEs for generating more employment.

Equity Markets: Local stocks eased after rising for four straight sessions as the global sentiments turned around following the recent surge. Some profit selling also emerged in the local indices amid cautiousness ahead of a pickup in corporate earnings in coming days. The Nifty 50 has dropped 0.31% to close at 10821.6 while the SENSEX dropped 0.29% to close at 36106.5.

Corporate News: TCS, India's largest IT firm by revenue, on Thursday reported a 24.1% rise in YoY profit at Rs 8,105 crore for the December quarter. The company noted that it is wrapping up 2018 with a strong revenue growth of 12.1% in the December quarter, which is the highest in 14 quarters, with continued growth acceleration in key verticals and across all geographies. Maruti Suzuki India announced a price change for select models owing to increase in commodity prices and foreign exchange rates etc. The price change varies across models and ranges upto Rs 10,000 (Ex-Showroom - Delhi). Reliance Industries said that the company is planning to shut down one of the Crude Distillation units and Coker Unit of its DTA refinery at Jamnagar for routine maintenance and inspection activities for about 4 weeks starting from 16 January 2019.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	67.8	(27.8)	(36.4)
MF(INR cr)	219.5	369.2	441.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,841	28,175	34,362
F&O(INR cr)	1,655,518	1,040,886	972,454

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.5	21.6	16.7
NSE VIX	15.4	15.9	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,529	(0.7) %	13.2 %	Energy	14,005	(0.4) %	5.4 %
IT	14,323	(0.0) %	12.7 %	Pharma	8,935	0.3 %	3.6 %
Metals	2,972	(0.1) %	(16.0) %	Finance	11,676	(0.6) %	13.8 %
Auto	8,933	0.3 %	(19.2) %	PSU	3,189	0.0 %	11.7 %
FMCG	30,572	(0.0) %	15.4 %	Real Estate	240	(0.3) %	(19.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bandhan Ba	472	3.5 %	(0.9) %	H P C L	233	(2.6) %	(32.4) %
ICICI Pru	349	3.5 %	(9.4) %	IndusInd B	1,566	(2.2) %	(13.2) %
ICICI Lomb	890	3.0 %	13.6 %	B H E L	69	(2.0) %	(16.5) %
HDFC Stand	407	2.7 %	(15.7) %	Shriram Tr	1,186	(2.0) %	(19.2) %
Aurobindo	777	2.6 %	31.1 %	Bharti Inf	285	(1.8) %	(15.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (NOV)	11-01-2019	00:30	AUD	-	0.003
ECB's Mersch Speaks in Bratislava	11-01-2019	08:20	EUR	-	-
Construction Output SA (MoM) (NOV)	11-01-2019	09:30	GBP	-	(0.002)
Construction Output SA (YoY) (NOV)	11-01-2019	09:30	GBP	-	0.038
Gross Domestic Product (MoM) (NOV)	11-01-2019	09:30	GBP	-	0.001
Index of Serices (MoM) (NOV)	11-01-2019	09:30	GBP	-	0.002
Index of Services (3Mo3M) (NOV)	11-01-2019	09:30	GBP	-	0.003
Industrial Production (MoM) (NOV)	11-01-2019	09:30	GBP	-	(0.006)
Industrial Production (YoY) (NOV)	11-01-2019	09:30	GBP	-	(0.008)
Manufacturing Production (MoM) (NOV)	11-01-2019	09:30	GBP	-	(0.009)
Manufacturing Production (YoY) (NOV)	11-01-2019	09:30	GBP	-	(0.01)
Monthly GDP 3M/3M Change (NOV)	11-01-2019	09:30	GBP	-	0.004
Trade Balance (NOV)	11-01-2019	09:30	GBP	-	-
Trade Balance Non EU GBP/Mn (NOV)	11-01-2019	09:30	GBP	-	-
Visible Trade Balance (Pounds) (NOV)	11-01-2019	09:30	GBP	-	-
Industrial Production NSA (YoY) (NOV)	11-01-2019	14:00	MXN	-	0.01
Consumer Price Index (MoM) (DEC)	11-01-2019	13:30	USD	-	0
Consumer Price Index (YoY) (DEC)	11-01-2019	13:30	USD	-	0.022
Consumer Price Index Core Index s.a. (DEC)	11-01-2019	13:30	USD	-	259.481
Consumer Price Index Ex Food and Energy (MoM) (DEC)	11-01-2019	13:30	USD	-	0.002
Consumer Price Index Ex Food and Energy (YoY) (DEC)	11-01-2019	13:30	USD	-	0.022
Consumer Price Index n.s.a. (DEC)	11-01-2019	13:30	USD	-	252.038
Real Avg Hourly Earning (YoY) (DEC)	11-01-2019	13:30	USD	-	0.008
Real Avg Weekly Earnings (YoY) (DEC)	11-01-2019	13:30	USD	-	0.005
Baker Hughes U.S. Rig Count (JAN 11)	11-01-2019	18:00	USD	-	1075
Monthly Budget Statement (DEC)	11-01-2019	19:00	USD	-	-

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