



11 Dec.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,488	0.0 %	2.7 %
BSE SENSEX	34,960	(2.0) %	5.1 %
CNX BANK	26,103	0.0 %	7.3 %
CNX MIDCAP	16,694	0.0 %	(12.6) %
CNX SMALLCAP	5,925	0.0 %	(25.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,423	0.1 %	(1.6) %
S&P 500	2,638	0.2 %	(2.2) %
FTSE 100	6,722	(56.6) %	(12.1) %
HANG SENG	25,752	(1.2) %	(15.6) %
NIKKEI	21,220	(2.1) %	(9.7) %
SHANGHAI COMPOSITE	2,585	(0.8) %	(22.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.34	0.6 %	12.0 %
EUR/USD	1.14	(0.1) %	(5.4) %
GBP/USD	1.26	(1.6) %	(6.9) %
USD/JPY	113.05	0.3 %	0.3 %
USD/AUD	1.39	0.3 %	8.6 %
USD/SGD	1.37	0.2 %	2.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	2.2 %	(12.9) %
Gold(INR/10g)	31,423	1.2 %	7.0 %
Gold Comex(USD/oz)	1,254	0.7 %	(4.2) %
SILVER(INR/1Kg)	36,995	1.1 %	(4.2) %
Aluminium(USD/MT)	1,962	0.9 %	(13.0) %
Copper(USD/MT)	6,173	1.0 %	(14.0) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.0) %	0.4 %

Global Economy: Eurozone's investor confidence eased sharply in December and dropped for a fourth month in a row, marking the lowest level since the same month in 2014, survey data from Sentix showed on Monday. The investor confidence index dropped to -0.3 from 8.8 in November, the behavioral research institute said. Both the current conditions index and expectations measure dropped sharply in December. A further interest rate hike by the Fed or an intensification of the US-China trade dispute seems to be the last thing the global economy needs at the moment, the institute added. Germany's merchandise exports grew more-than-expected in October and at the fastest pace in five months, preliminary figures from Destatis showed. Exports increased a calendar and seasonally adjusted 0.7% from September, when they dropped 0.4%.

Global Equities: Markets started off in a cautious manner following recent turmoil as global trade concerns and Brexit uncertainties stayed in place.

Indian Economy: The RBI Governor Urjit Patel has resigned ahead of a critical board meet, citing personal reasons. The cumulative area for all rabi crops stood 6.17% lower than last year at 414.29 lakh hectare (lh) as on December 7 2018. Apart from wheat, all other crop categories have reported lower acreage as compared to the same period last year. The area under wheat cultivation stood at 194.49 lh, which is up around 2% over the last year. The Provisional Figures of Direct Tax Collections up to November, 2018 show that gross collections are at Rs. 6.75 lakh crore which is 15.7% higher than the gross collections for the corresponding period of last year. Refunds amounting to Rs.1.23 lakh crore have been issued during April, 2018 to November, 2018, which is 20.8% higher than refunds issued during the same period in the preceding year. Net collections (after adjusting for refunds) have increased by 14.7% to Rs. 5.51 lakh crore during April - November, 2018. The Net Direct Tax collections represent 48% of the total Budget Estimates of Direct Taxes for FY 2018-19 (Rs. 11.50 lakh crore).

Equity Markets: Local stocks tumbled yesterday, extending the recent losing streak. The key benchmark indices plummeted 2% as exit poll results raised concerns over the ruling BJP winning the some key state elections. Local equities dropped sharply weighed by slide in index pivots Reliance Industries, Kotak Mahindra Bank, HDFC and Infosys. The barometer index, the S&P BSE Sensex, lost 713.53 points or 2% to settle at 34,959.72. The Nifty 50 index lost 205.25 points or 1.92% to settle at 10,488.45. The Sensex dropped below the psychologically important 35,000 mark. Domestic market followed weakness in other Asian and European shares amid rising tensions between the US and China as well as disappointing Chinese trade data for November.

Corporate News: Tata Consultancy Services has won the Association for Talent Development's (ATD's) 2018 BEST Award, and ranked #2 among the top 45 global organizations recognized at the event. ATD's BEST Award recognizes organizations that demonstrate enterprise-wide success through talent development. India Overseas Bank has successfully raised Rs.300 crore by issue of Basel III Compliant Tier II Bonds with coupon rate of 11.70% and tenor of 10 years and call option at the end of 5 years or on any coupon payment date thereafter.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	672.4	128.2	(38.2)
MF(INR cr)	583.0	(148.9)	459.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	0	27,815	34,802
F&O(INR cr)	479,809	738,477	962,594

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	23.2	20.5	15.6
NSE VIX	20.4	18.8	14.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,103	(1.8) %	7.3 %	Energy	13,657	(2.5) %	2.8 %
IT	14,419	(1.7) %	13.5 %	Pharma	8,535	(1.7) %	(1.0) %
Metals	3,036	(1.1) %	(14.2) %	Finance	11,061	(2.3) %	7.8 %
Auto	8,784	(1.0) %	(20.6) %	PSU	2,807	(0.6) %	(1.7) %
FMCG	29,212	(1.6) %	10.2 %	Real Estate	223	(3.0) %	(24.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
I O C L	134	3.5 %	(21.2) %	Kotak Mah.	1,198	(6.4) %	9.3 %
B P C L	330	1.5 %	(22.0) %	B H E L	63	(4.5) %	(23.7) %
H P C L	227	0.8 %	(34.2) %	LIC Housin	420	(4.4) %	(22.2) %
Coal India	238	0.6 %	(14.2) %	Indiabulls	687	(4.2) %	(44.8) %
Maruti Suz	7,351	0.5 %	(18.4) %	UltraTech	3,777	(4.0) %	(5.1) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Australia Manpower Survey (1Q)	11-12-2018	00:01	AUD	-	0.15
House Price Index (QoQ) (3Q)	11-12-2018	00:30	AUD	-	(0.007)
House Price Index (YoY) (3Q)	11-12-2018	00:30	AUD	-	(0.006)
NAB Business Conditions (NOV)	11-12-2018	00:30	AUD	-	12
NAB Business Confidence (NOV)	11-12-2018	00:30	AUD	-	4
Westpac Consumer Conf Index (DEC)	11-12-2018	23:30	AUD	-	104.3
Westpac Consumer Confidence (DEC)	11-12-2018	23:30	AUD	-	0.028
Manpower Survey (1Q)	11-12-2018	00:01	CNY	-	0.07
ECB's Guindos Speaks in Frankfurt	11-12-2018	08:30	EUR	-	-
Euro-Zone ZEW Survey (Economic Sentiment) (DEC)	11-12-2018	10:00	EUR	-	(22)
German ZEW Survey Current Situation (DEC)	11-12-2018	10:00	EUR	-	58.2
German ZEW Survey Expectations (DEC)	11-12-2018	10:00	EUR	-	(24.1)
Average Weekly Earnings (3M/YoY) (OCT)	11-12-2018	09:30	GBP	-	0.03
Claimant Count Rate (NOV)	11-12-2018	09:30	GBP	-	0.027
Employment Change 3M/3M (OCT)	11-12-2018	09:30	GBP	-	-
ILO Unemployment Rate 3Mths (OCT)	11-12-2018	09:30	GBP	-	0.041
Jobless Claims Change (NOV)	11-12-2018	09:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (OCT)	11-12-2018	09:30	GBP	-	0.032
Japan Manpower Survey (1Q)	11-12-2018	00:01	JPY	-	26
Machine Tool Orders (YoY) (NOV P)	11-12-2018	06:00	JPY	-	(0.007)
Domestic Corporate Goods Price Index (MoM) (NOV)	11-12-2018	23:50	JPY	-	0.003
Domestic Corporate Goods Price Index (YoY) (NOV)	11-12-2018	23:50	JPY	-	0.029
Machine Orders (MoM) (OCT)	11-12-2018	23:50	JPY	-	(0.183)
Machine Orders (YoY) (OCT)	11-12-2018	23:50	JPY	-	(0.07)
New Zealand Manpower Survey (1Q)	11-12-2018	00:01	NZD	-	0.16
RBNZ's Orr at Parliament Committee on Annual Report	11-12-2018	19:15	NZD	-	-
NFIB Small Business Optimism (NOV)	11-12-2018	11:00	USD	-	107.4
PPI Ex Food, Energy, Trade (MoM) (NOV)	11-12-2018	13:30	USD	-	0.002
PPI Ex Food, Energy, Trade (YoY) (NOV)	11-12-2018	13:30	USD	-	0.000



PPI Final Demand (YoY) (NOV)	11-12-2018	13:30	USD	-	0.029
Producer Price Index Ex Food and Energy (MoM) (NOV)	11-12-2018	13:30	USD	-	0.005
Producer Price Index Ex Food and Energy (YoY) (NOV)	11-12-2018	13:30	USD	-	0.026
Producer Price Index Final Demand (MoM) (NOV)	11-12-2018	13:30	USD	-	0.006
U.S. to Sell USD38 Bln 3-Year Notes	11-12-2018	18:00	USD	-	-

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