



12 Feb.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|----------|
| CNX NIFTY | 10,895 | 0.1 % | 6.7 % |
| BSE SENSEX | 36,395 | (0.4) % | 9.5 % |
| CNX BANK | 27,248 | 0.1 % | 12.0 % |
| CNX MIDCAP | 16,386 | 0.4 % | (14.2) % |
| CNX SMALLCAP | 5,825 | 0.0 % | (26.5) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 25,053 | (0.2) % | 7.4 % |
| S&P 500 | 2,710 | 0.1 % | 8.1 % |
| FTSE 100 | 7,129 | 0.8 % | 5.9 % |
| HANG SENG | 28,144 | 0.7 % | 12.0 % |
| NIKKEI | 20,333 | (2.0) % | 3.9 % |
| SHANGHAI COMPOSITE | 2,654 | 1.4 % | 7.7 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 71.17 | (0.4) % | 2.5 % |
| EUR/USD | 1.13 | (0.5) % | (1.5) % |
| GBP/USD | 1.29 | (0.6) % | 1.0 % |
| USD/JPY | 110.45 | 0.7 % | 0.8 % |
| USD/AUD | 1.41 | (0.1) % | (0.5) % |
| USD/SGD | 1.36 | 0.2 % | (0.4) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| WTI Crude(USD/bbl) | 52 | 0.0 % | 12.6 % |
| Gold(INR/10g) | 32,913 | (0.4) % | 4.4 % |
| Gold Comex(USD/oz) | 1,306 | (0.5) % | 1.2 % |
| SILVER(INR/1Kg) | 39,761 | (0.3) % | 3.9 % |
| Aluminium(USD/MT) | 1,865 | 0.1 % | 0.4 % |
| Copper(USD/MT) | 6,207 | (0.3) % | 6.3 % |

FIXED INCOME

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

Global Economy: UK economic growth slowed more-than-expected in the fourth quarter of 2018, and the full year growth was the weakest since 2009, preliminary figures from the Office For National Statistics showed on Monday. Gross domestic product grew 0.2% from the third quarter, when the economy expanded 0.6%. On a year-on-year basis, GDP rose 1.3% in the fourth quarter, which was the weakest pace since the second quarter of 2012. The International Monetary Fund has warned governments to gear up for a possible economic storm as growth undershoots expectations. The fund now sees an economy that is growing more slowly than we had anticipated, IMF managing director Christine Lagarde told the World Government Summit in Dubai, noted media reports. Bank of France on Monday projected 0.4% growth for the French economy in the first quarter of this year, which is slightly faster than the 0.3% rise in the final three months of 2018.

Global Equities: Equities stayed cautious amid continued concerns over the US-China trade talks. Europe's stock markets see modest buying after last week's sharp losses. Shanghai stocks reopened positively after a weeklong break, hitting three month high.

Indian Economy: FICCI's latest Quarterly Survey on Manufacturing presents a better outlook for hiring and production in Manufacturing. The survey portrays a better outlook for the manufacturing sector in Q-3 (October-December 2018-19) as the percentage of respondents reporting higher production in third quarter were much higher than those reporting higher production in Q-3 of 2017-18. The proportion of respondents reporting higher output growth during the October-December 2018 quarter was 54% as compared to 47% in Q-3 of 2017-18. The percentage of respondents reporting low production was only 13.5% in Q-3 2018-19 as compared to 15% in Q-3 of 2017-18. On hiring front the outlook for the sector seems to have slightly improved for near future. While in Q-3 of 2017-18, 70% respondents mentioned that they were not likely to hire additional workforce, this percentage has come down to 65% for Q-3 of 2018-19.

Equity Markets: Key equity indices declined for second straight session due to selling pressure in index pivotals. Investors worried over global uncertainties amid lingering fears over US-China trade talks and global growth. The Sensex fell 151.45 points or 0.41% to settle at 36,395.03, its lowest closing level since 31 January 2019. The Nifty 50 index fell 54.80 points or 0.50% to settle at 10,888.80, its lowest closing level since 31 January 2019.

Corporate News: Alembic Pharmaceuticals announced that Aleor Dermaceuticals (Aleor), a 60:40 Joint Venture between Alembic Pharmaceuticals and Orbicular Pharmaceutical Technologies, has completed United States Food and Drug Administration (USFDA) inspection at its formulation manufacturing facility located at Karakhadi, Gujarat, India; with two observations. Ratings agency India Ratings & Research has maintained a "stable" outlook on India's road and aviation sector for the financial year 2019-20. According to its report released on February 11, the agency expects the infrastructure sector to remain stable in FY20 on the back of "stable economic growth"



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|---------|--------|--------|
| FII(USD mm) | 113.9 | 77.8 | (29.9) |
| MF(INR cr) | (861.4) | (79.8) | 415.8 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 29,644 | 35,250 | 34,327 |
| F&O(INR cr) | 546,033 | 810,389 | 963,321 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 16.0 | 15.8 | 16.8 |
| NSE VIX | 15.8 | 15.7 | 15.2 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|---------|----------|-------------|--------|---------|----------|
| Banks | 27,228 | (0.2) % | 11.9 % | Energy | 14,763 | (1.7) % | 11.1 % |
| IT | 16,099 | 0.5 % | 26.7 % | Pharma | 8,838 | (1.6) % | 2.5 % |
| Metals | 2,725 | (0.6) % | (23.0) % | Finance | 11,489 | (0.4) % | 12.0 % |
| Auto | 8,320 | (1.2) % | (24.8) % | PSU | 2,845 | (1.7) % | (0.3) % |
| FMCG | 29,729 | (0.1) % | 12.2 % | Real Estate | 224 | (1.0) % | (24.3) % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|--------|----------|------------|--------|---------|----------|
| Sun TV Net | 574 | 10.2 % | (33.3) % | General In | 216 | (6.8) % | (41.6) % |
| Tata Steel | 481 | 2.5 % | (16.9) % | Dr Reddy's | 2,615 | (5.6) % | 22.7 % |
| Godrej Con | 698 | 2.1 % | (6.1) % | M & M | 648 | (5.1) % | (13.4) % |
| Container | 521 | 2.1 % | 4.9 % | ICICI Pru | 298 | (4.9) % | (22.5) % |
| Vodafone I | 31 | 2.0 % | (60.0) % | Ashok Leyl | 83 | (4.5) % | (43.9) % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|---|------------|-----------|--------|--------|----------------|
| Home Loans (MoM) (DEC) | 12-02-2019 | 0:30 | AUD | - | (0.009) |
| Investment Lending (DEC) | 12-02-2019 | 0:30 | AUD | - | (0.045) |
| NAB Business Conditions (JAN) | 12-02-2019 | 0:30 | AUD | - | 2 |
| NAB Business Confidence (JAN) | 12-02-2019 | 0:30 | AUD | - | 3 |
| Value of Loans (MoM) (DEC) | 12-02-2019 | 0:30 | AUD | - | (0.014) |
| RBA's Heath Speaks in Sydney | 12-02-2019 | 20:50 | AUD | - | - |
| Westpac Consumer Conf Index (FEB) | 12-02-2019 | 23:30 | AUD | - | 99.6 |
| Westpac Consumer Confidence (FEB) | 12-02-2019 | 23:30 | AUD | - | (0.047) |
| ECB's Lautenschlaeger Speaks in Sydney | 12-02-2019 | 23:30 | EUR | - | - |
| BOE Governor Carney Speaks in London | 12-02-2019 | 13:00 | GBP | - | - |
| BOJ Outright Bond Purchase 10~25 Years | 12-02-2019 | 1:10 | JPY | - | - |
| BOJ Outright Bond Purchase 25 Years~ | 12-02-2019 | 1:10 | JPY | - | - |
| Domestic Corporate Goods Price Index (MoM) (JAN) | 12-02-2019 | 23:50 | JPY | - | (0.006) |
| Domestic Corporate Goods Price Index (YoY) (JAN) | 12-02-2019 | 23:50 | JPY | - | 0.015 |
| Tertiary Industry Index (MoM) (DEC) | 12-02-2019 | 4:30 | JPY | - | (0.003) |
| Machine Tool Orders (YoY) (JAN P) | 12-02-2019 | 6:00 | JPY | - | (0.183) |
| QV House Prices (YoY) (JAN) | 12-02-2019 | 16:00 | NZD | - | 0.032 |
| NFIB Small Business Optimism (JAN) | 12-02-2019 | 11:00 | USD | - | 104.4 |
| JOLTS Job Openings (DEC) | 12-02-2019 | 15:00 | USD | - | 6888 |
| Powell Speaks in Mississippi About Rural Poverty | 12-02-2019 | 17:45 | USD | - | - |
| Fed's Mester Speaks on Economic Outlook and Monetary Policy | 12-02-2019 | 23:30 | USD | - | - |

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