



13 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,876	0.4 %	6.5 %
BSE SENSEX	36,154	(0.7) %	9.2 %
CNX BANK	27,078	0.2 %	11.3 %
CNX MIDCAP	16,443	0.7 %	(13.9) %
CNX SMALLCAP	5,838	0.6 %	(26.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,426	1.5 %	9.0 %
S&P 500	2,745	1.3 %	9.5 %
FTSE 100	7,133	0.1 %	5.9 %
HANG SENG	28,171	0.1 %	12.1 %
NIKKEI	20,864	2.6 %	6.7 %
SHANGHAI COMPOSITE	2,672	0.7 %	8.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.72	(0.8) %	1.8 %
EUR/USD	1.13	0.1 %	(1.0) %
GBP/USD	1.29	(0.4) %	1.2 %
USD/JPY	110.60	0.8 %	0.9 %
USD/AUD	1.41	(0.3) %	(1.0) %
USD/SGD	1.36	(0.0) %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	1.3 %	14.1 %
Gold(INR/10g)	32,891	(0.1) %	4.3 %
Gold Comex(USD/oz)	1,310	0.3 %	1.5 %
SILVER(INR/1Kg)	39,781	0.1 %	4.0 %
Aluminium(USD/MT)	1,848	(0.9) %	(0.5) %
Copper(USD/MT)	6,148	(1.0) %	5.3 %

FIXED INCOME

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

Global Economy: The IFO World Economic Climate index for the first quarter of 2019 slipped for the fourth time in a row to minus 13.1 points, the German ifo Institute announced. For the fourth quarter of 2018, the index for the global business climate stood at -2.2 points. The ifo index for the global economic climate in the first quarter of 2019 is based on responses of 1,293 experts from over 100 countries. The experts surveyed by the Institute expected weaker growth of private consumption, investments and world trade, as well as a worldwide depreciation of the US dollar. Japan M2 money stock was up 2.4 percent on year in January, the Bank of Japan said - coming in at 1,015.1 trillion yen. The M3 money stock advanced an annual 2.1% to 1,348.4 trillion yen. The L money stock was up an annual 1.9% to 1,794.3 trillion yen, slowing from the 2% advance in the previous month. Australia home loans issued in the month of December was down a seasonally adjusted 6.1%, the Australian Bureau of Statistics said, following the 0.9% contraction in November. The value of loans sank 5.3% on month, following the 1.4% fall in the previous month.

Global Equities: Sentiments were supported as another round of US-China trade talks got underway in Beijing. US congressional negotiators reached an agreement to fund government and avoid another shutdown.

Indian Economy: Consumer Price Index (CPI) inflation slipped to 2.05% in January, the lowest level since June 2017, government data showed on Monday. Factory output or Index of Industrial Production (IIP) rose to 2.4% in December as against just 0.5% growth rate in November. Last month's figures marked 19 month low for the IIP. The Securities and Exchange Board of India (SEBI) has proposed price bands for all futures & options (F&O) stocks, seeking to curb excessive price volatility in equity scrips that have derivative instruments available for trading. SEBI noted in a latest paper that an examination of the price movements of F&O stocks in the past six months showed that 40 scrips witnessed intra-day movement of more than 20%. Of this, 29 scrips saw intra-day movements between 20% and 30%. It further said that five stocks moved between 30% and 40% and six more than 40%.

Equity Markets: Key equity benchmarks declined for the third straight trading session. Local stocks saw an extension of recent selling spree as markets continued to ease from four month highs. Equity benchmarks closed the session down around half a percent. Bulk of the decline was led by Banks, automobiles, consumption, and IT.

Corporate News: Rupee hit near one month high after breaking its crucial level of 71 per dollar level. This can weigh on the local IT counters. Sun Pharmaceutical Industries said its net profit jumped 286.1% to Rs 1,241.1 crore in the third quarter ended December 2018, following a strong recovery of US generics business. Revenues from operations gained 17% to Rs 7,933.25 crore. Tata Group hospitality firm Indian Hotels Company reported a 51% rise in its consolidated net profit to Rs 170.03 crore for the quarter ended December 31. The company had posted a net profit of Rs 112.61 crore for the corresponding period previous fiscal. Net Sales at Rs 556.70 crore in December 2018 down 0.98% from Rs. 562.20 crore in December 2017. Quarterly Net Profit at Rs. 159.50 crore in December 2018 down 26.63% from Rs. 217.40 crore in December 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(56.9)	58.6	(30.0)
MF(INR cr)	(146.2)	(89.3)	413.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,094	34,606	34,308
F&O(INR cr)	683,891	794,577	962,028

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.4	15.8	16.7
NSE VIX	15.8	15.7	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,011	(0.8) %	11.0 %	Energy	14,802	0.3 %	11.4 %
IT	15,939	(1.0) %	25.4 %	Pharma	8,905	0.8 %	3.3 %
Metals	2,768	1.6 %	(21.8) %	Finance	11,369	(1.0) %	10.8 %
Auto	8,278	(0.5) %	(25.1) %	PSU	2,800	(1.6) %	(1.9) %
FMCG	29,524	(0.7) %	11.4 %	Real Estate	221	(1.4) %	(25.4) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
SAIL	47	5.6 %	(35.2) %	Vodafone I	30	(4.5) %	(61.8) %
JSW Steel	272	3.9 %	(8.4) %	Bharti Inf	313	(3.3) %	(7.3) %
Zee Entert	415	3.2 %	(28.4) %	Britannia	3,009	(3.2) %	17.8 %
ICICI Lomb	883	3.0 %	12.7 %	General In	209	(3.1) %	(43.4) %
Piramal En	2,179	2.8 %	(11.8) %	Hero Motoc	2,800	(3.1) %	(23.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Teranet/National Bank HP Index (JAN)	13-02-2019	13:30	CAD	-	224.07
Teranet/National Bank HPI (MoM) (JAN)	13-02-2019	13:30	CAD	-	(0.003)
Teranet/National Bank HPI (YoY) (JAN)	13-02-2019	13:30	CAD	-	0.025
Euro-Zone Industrial Production s.a. (MoM) (DEC)	13-02-2019	10:00	EUR	-	(0.017)
Euro-Zone Industrial Production w.d.a. (YoY) (DEC)	13-02-2019	10:00	EUR	-	(0.033)
Consumer Price Index (MoM) (JAN)	13-02-2019	9:30	GBP	-	0.002
Consumer Price Index (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.021
Core Consumer Price Index (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.019
CPIH (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.02
House Price Index (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.028
Producer Price Index Input n.s.a. (MoM) (JAN)	13-02-2019	9:30	GBP	-	(0.01)
Producer Price Index Input n.s.a. (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.037
Producer Price Index Output Core n.s.a. (MoM) (JAN)	13-02-2019	9:30	GBP	-	0.002
Producer Price Index Output Core n.s.a. (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.025
Producer Price Index Output n.s.a. (MoM) (JAN)	13-02-2019	9:30	GBP	-	(0.003)
Producer Price Index Output n.s.a. (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.025
Retail Price Index (JAN)	13-02-2019	9:30	GBP	-	285.6
Retail Price Index (MoM) (JAN)	13-02-2019	9:30	GBP	-	0.004
Retail Price Index (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.027
Retail Price Index Ex Mort Int.Payments (YoY) (JAN)	13-02-2019	9:30	GBP	-	0.027
GDP Business Spending (QoQ) (4Q P)	13-02-2019	23:50	JPY	-	(0.028)
Gross Domestic Product Annualized s.a. (QoQ) (4Q P)	13-02-2019	23:50	JPY	-	(0.025)
Gross Domestic Product Deflator (YoY) (4Q P)	13-02-2019	23:50	JPY	-	(0.003)
Gross Domestic Product Private Consumption (QoQ) (4Q P)	13-02-2019	23:50	JPY	-	(0.002)
Gross Domestic Product s.a. (QoQ) (4Q P)	13-02-2019	23:50	JPY	-	(0.006)
Nominal Gross Domestic Product (QoQ) (4Q P)	13-02-2019	23:50	JPY	-	(0.007)
RBNZ Official Cash Rate (FEB 13)	13-02-2019	1:00	NZD	-	0.0175
RBNZ's Orr at Parliament Select Committee on MPS	13-02-2019	19:10	NZD	-	-
RBNZ's Governor's News Conference After OCR Decision	13-02-2019	2:00	NZD	-	-



Reserve Bank of New Zealand 2-Year Inflation Expectation (1Q)	13-02-2019	2:00	NZD	-	0.0203
Food Prices (MoM) (JAN)	13-02-2019	21:45	NZD	-	(0.002)
Fed's George Speaks on the U.S. Economy	13-02-2019	0:30	USD	-	-
MBA Mortgage Applications (FEB 08)	13-02-2019	12:00	USD	-	(0.025)
Consumer Price Index (MoM) (JAN)	13-02-2019	13:30	USD	-	(0.001)
Consumer Price Index (YoY) (JAN)	13-02-2019	13:30	USD	-	0.019
Consumer Price Index Core Index s.a. (JAN)	13-02-2019	13:30	USD	-	260.027
Consumer Price Index Ex Food and Energy (MoM) (JAN)	13-02-2019	13:30	USD	-	0.002
Consumer Price Index Ex Food and Energy (YoY) (JAN)	13-02-2019	13:30	USD	-	0.022
Consumer Price Index n.s.a. (JAN)	13-02-2019	13:30	USD	-	251.233
Real Avg Hourly Earning (YoY) (JAN)	13-02-2019	13:30	USD	-	0.011
Real Avg Weekly Earnings (YoY) (JAN)	13-02-2019	13:30	USD	-	0.012
Fed's Bostic to Speak to European Financial Forum in Dublin	13-02-2019	13:50	USD	-	-
Fed's Mester Speaks on Economic Outlook and Monetary Policy	13-02-2019	13:50	USD	-	-
DOE Cushing OK Crude Inventory (FEB 08)	13-02-2019	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (FEB 08)	13-02-2019	15:30	USD	-	-
DOE U.S. Distillate Inventory (FEB 08)	13-02-2019	15:30	USD	-	-
DOE U.S. Gasoline Inventories (FEB 08)	13-02-2019	15:30	USD	-	-
Fed's Harker Speaks on the Economic Outlook	13-02-2019	17:00	USD	-	-
Monthly Budget Statement (DEC)	13-02-2019	19:00	USD	-	-

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