



14 Jan.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,754	(0.4) %	5.3 %
BSE SENSEX	36,010	(0.3) %	7.8 %
CNX BANK	27,266	(0.7) %	12.1 %
CNX MIDCAP	17,598	(0.3) %	(7.8) %
CNX SMALLCAP	6,391	(0.1) %	(19.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,996	(0.0) %	2.9 %
S&P 500	2,596	(0.0) %	3.6 %
FTSE 100	6,918	(0.4) %	2.7 %
HANG SENG	26,667	0.6 %	6.1 %
NIKKEI	20,360	1.0 %	4.1 %
SHANGHAI COMPOSITE	2,554	0.7 %	3.6 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.50	0.2 %	1.5 %
EUR/USD	1.15	(0.5) %	0.2 %
GBP/USD	1.28	0.7 %	0.8 %
USD/JPY	108.49	0.1 %	(1.0) %
USD/AUD	1.39	(0.1) %	(2.5) %
USD/SGD	1.35	0.2 %	(0.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(2.5) %	10.9 %
Gold(INR/10g)	32,117	0.0 %	1.9 %
Gold Comex(USD/oz)	1,288	(0.2) %	(0.2) %
SILVER(INR/1Kg)	39,129	(0.1) %	2.3 %
Aluminium(USD/MT)	1,816	(1.5) %	(2.3) %
Copper(USD/MT)	5,927	0.3 %	1.5 %

**FIXED INCOME**

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

**Global Economy:** Consumer prices in the US edged slightly lower in the month of December, according to a report released by the Labor Department on Friday. The Labor Department said its consumer price index slipped by 0.1% in December after coming in unchanged in November. UK economic growth edged up for a second straight month in November, led by services and construction growth, the monthly estimate from the Office for National Statistics (ONS) showed on Friday. Gross domestic product expanded 0.2% from October, when the economy expanded 0.1%. Construction output rose 0.6% month-on-month in November while the services output rose 0.3% from the previous month after a 0.2% gain in October. Japan posted a current account surplus of 757.2 billion yen in November, the Ministry of Finance said on Friday, down from 1,309.9 billion yen in October. The trade balance reflected a deficit of 559.1 billion yen following the 321.7 billion yen deficit in the previous month. Exports were up 1.9% on year to 6.918 trillion yen, while imports surged an annual 13.5% to 7.477 trillion yen.

**Global Equities:** The US stocks ended marginally lower on Friday. Concerns about the US government shutdown and worries about a potential trade deal between the US and China stayed in place.

**Indian Economy:** India's industrial production (base year 2011-12=100) moderated sharply to mere 0.5% in November 2018, compared with 8.4% growth recorded in October 2018. The industrial production growth for October 2018 has been revised upwards from 8.1% increase reported provisionally. India's fuel product consumption or sales improved 3.2% to 18.51 million tonnes (mt) in December 2018 over a year ago. Diesel sales increased 3.5% to 7.37 mt, petrol 10.0% to 2.40 mt, naphtha 10.8% to 1.23 mt and LPG 5.6% to 2.16 mt. Latest data from the Reserve Bank of India (RBI) showed that the inflows of foreign direct investment inflows to India remained healthy at US\$ 29.54 billion in April-November period of financial year ending March 2019 (FY2019) compared with US\$ 31.55 billion in the corresponding period of last year. The FDI inflows were robust at US\$ 45.521 billion in the full financial year FY2018.

**Equity Markets:** Key equity indices reversed early gains and ended lower for second straight session, led by weakness in TCS, Reliance Industries and Larsen & Toubro.

**Corporate News:** Infosys' net profit fell 12.17% to Rs 3610 crore on 3.84% increase in revenues to Rs 21400 crore in Q3 December 2018 over Q2 September 2018. Operating profit was reported at Rs 4830 crore, a growth of 11.8% year-on-year and a decline of 1.3% quarter-on-quarter. The company revised its FY2019 revenue guidance in constant currency upward to 8.5%-9.0%. It retained operating margin guidance at 22%-24%. Yes Bank announced the appointment of Brahm Dutt as non-executive part-time chairman of the board. NTPC said it has decided to raise Rs 4,000 crore through private placement of secured non-convertible bonds in the nature of debentures at a coupon of 8.30% per annum with a door to door maturity of 10 years. Net profit of Avenue Supermarts rose 2.12% to Rs 257.11 crore on 33.15% rise in net sales to Rs 5450.94 crore in Q3 December 2018 over Q3 December 2017. Earnings before interest, tax, depreciation and amortization (EBITDA) in Q3 December 2018 stood at Rs 453 crore, up by 7.5%. The company's EBITDA margin is at 8.3% in Q3 December 2018 as compared to 10.3% in Q3 December 2017.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(43.6)	(29.8)	(36.4)
MF(INR cr)	303.8	360.8	441.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	27,798	28,133	34,328
F&O(INR cr)	503,549	981,182	970,037

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.2	21.2	16.7
NSE VIX	15.4	15.8	15.0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,454	(0.3) %	12.8 %	Energy	13,938	(0.5) %	4.9 %
IT	14,307	(0.1) %	12.6 %	Pharma	8,902	(0.4) %	3.3 %
Metals	2,971	(0.0) %	(16.1) %	Finance	11,691	0.1 %	13.9 %
Auto	8,862	(0.8) %	(19.9) %	PSU	3,160	(0.9) %	10.7 %
FMCG	30,759	0.6 %	16.1 %	Real Estate	237	(1.4) %	(20.2) %

### NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
A B B	1,346	3.5 %	4.1 %	Bandhan Ba	454	(3.6) %	(4.5) %
ICICI Pru	357	2.3 %	(7.3) %	Interglobe	1,057	(3.6) %	(20.4) %
ITC	295	2.0 %	14.4 %	Shree Ceme	15,913	(3.5) %	(3.0) %
Biocon	643	1.9 %	7.4 %	IndusInd B	1,515	(3.2) %	(16.0) %
UPL	783	1.3 %	4.1 %	Tata Motor	180	(2.9) %	(46.8) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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