



14 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,763	(0.3) %	5.4 %
BSE SENSEX	36,034	(0.3) %	8.1 %
CNX BANK	26,852	(0.1) %	10.4 %
CNX MIDCAP	16,183	(0.6) %	(15.3) %
CNX SMALLCAP	5,722	(0.6) %	(27.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,543	0.5 %	9.5 %
S&P 500	2,753	0.3 %	9.8 %
FTSE 100	7,191	0.8 %	6.8 %
HANG SENG	28,498	1.2 %	13.4 %
NIKKEI	21,144	1.3 %	8.1 %
SHANGHAI COMPOSITE	2,721	1.8 %	10.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.81	(0.5) %	2.0 %
EUR/USD	1.13	(0.1) %	(1.6) %
GBP/USD	1.29	(0.1) %	0.9 %
USD/JPY	111.00	0.5 %	1.3 %
USD/AUD	1.41	(0.4) %	(0.9) %
USD/SGD	1.36	(0.1) %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	1.5 %	15.8 %
Gold(INR/10g)	32,855	(0.1) %	4.2 %
Gold Comex(USD/oz)	1,308	(0.1) %	1.3 %
SILVER(INR/1Kg)	39,511	(0.7) %	3.3 %
Aluminium(USD/MT)	1,841	(0.4) %	(0.9) %
Copper(USD/MT)	6,102	(0.7) %	4.5 %

FIXED INCOME

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

Global Economy: The US national debt has topped a record \$22 trillion, less than a year after it crossed the \$21 trillion mark, indicating a further deterioration in the nation's finances. The Peterson Foundation said the US national debt has risen by \$1 trillion in the past 11 months, calling it the latest sign that our fiscal situation is not only unsustainable, but accelerating, noted media reports. Consumer prices in the US were unchanged for the third straight month in January, according to a report released by the Labor Department on Wednesday. Eurozone industrial production fell 0.9% in December from November, when it decreased 1.7%, figures from Eurostat showed. Compared to a year ago, production shrunk 4.2% after a 3% decline in November. In 2018, industrial production rose an average 1.1% in the euro area. UK consumer price index rose 1.8% year-on-year in January following a 2.1% increase in December, figures from the Office for National Statistics showed. Headline inflation was the slowest since January 2017, when prices rose at the same pace. Inflation thus fell below the Bank of England's 2% target in January. Core inflation was steady at 1.9%.

Global Equities: Trade deal optimism fueled sentiments. US President Donald Trump said that he may hold off on raising tariffs if deal with China seems close. However, European economic woes remain in place as the Bank of England governor has warned that no-deal Brexit could cause recession.

Indian Economy: Bank credit and deposits growth marginally dropped on a fortnightly basis. Bank credit grew by 14.5% to Rs 94.29 lakh crore while deposits grew at a 9.63% to Rs 121.22 lakh crore for the fortnight ending February 1, according to the latest RBI data. In the previous fortnight ended January 18, deposits had increased by 9.69% to Rs 119.86 lakh crore and credit had risen by 14.61% to Rs 93.32 lakh crore. FY19 third-quarter residential property sales rose 5% on in year-on-year basis across top tier I cities in the country with southern cities leading the growth. The residential sales was recorded at 69,886 units in Q3 of FY19 as compared to the same period last year, mainly driven by affordable housing segments, said a recent report by Liases Foras report.

Equity Markets: Key indices wiped off early gains to end with modest losses in a volatile session. The Sensex regained the psychological 36,000 after sliding below that level in intraday trade. The Nifty ended below 10,800 mark. State-run oil marketing companies tumbled amid firming crude oil prices. The Sensex fell 119.51 points or 0.33% to settle at 36,034.11, its lowest closing level since 30 January 2019. The Nifty 50 index fell 37.75 points or 0.35% to settle at 10,793.65, its lowest closing level since 30 January 2019.

Corporate News: Yes Bank announced after market hours yesterday, 13 February 2019, that the Reserve Bank of India (RBI) assesses compliance by banks with extant prudential norms on income recognition, asset classification and provisioning (IRACP) as part of its supervisory processes. As part of this process, Yes Bank has received the Risk Assessment Report for FY2018. The report observes NIL divergences in the bank's asset classification and provisioning from the RBI norms. Dewan Housing Finance Corporation (DHFL) announced after market hours yesterday, 13 February 2019, that due to full-time engagement with other assignments within the company, Harshil Mehta, has expressed his desire to resign from the position of whole time director (designated as joint managing director & CEO) from the board of directors of the company with immediate effect. ABB India announced after market hours yesterday, 13 February 2019, that its board discussed segregation of the company's power grids business from the other businesses conducted by the company.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	164.9	71.8	(29.1)
MF(INR cr)	975.7	43.9	415.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,358	34,245	34,294
F&O(INR cr)	869,113	802,859	961,599

MARKET VOLATILITY

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

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,885	(0.5) %	10.5 %	Energy	14,576	(1.5) %	9.7 %
IT	16,042	0.6 %	26.2 %	Pharma	8,840	(0.7) %	2.5 %
Metals	2,742	(0.9) %	(22.5) %	Finance	11,369	0.0 %	10.8 %
Auto	8,178	(1.2) %	(26.1) %	PSU	2,741	(2.1) %	(4.0) %
FMCG	29,439	(0.3) %	11.1 %	Real Estate	222	0.4 %	(25.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
General In	219	4.7 %	(40.8) %	Eicher Mot	20,159	(4.6) %	(28.7) %
Adani Port	342	4.5 %	(7.6) %	Container	489	(4.6) %	(1.5) %
Indiabulls	619	3.3 %	(50.2) %	Bharat Ele	75	(4.1) %	(48.5) %
Motherson	133	3.3 %	(38.3) %	H P C L	225	(3.8) %	(34.7) %
UPL	817	2.6 %	8.6 %	Bosch	17,908	(3.7) %	(3.3) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (FEB)	14-02-2019	0:00	AUD	-	0.035
RBA's Kent Gives Speech in Melbourne	14-02-2019	20:45	AUD	-	-
Manufacturing Sales (MoM) (DEC)	14-02-2019	13:30	CAD	-	(0.014)
New Housing Price Index (MoM) (DEC)	14-02-2019	13:30	CAD	-	0
New Housing Price Index (YoY) (DEC)	14-02-2019	13:30	CAD	-	0
Producer & Import Prices (MoM) (JAN)	14-02-2019	7:30	CHF	-	(0.006)
Producer & Import Prices (YoY) (JAN)	14-02-2019	7:30	CHF	-	0.006
Euro-Zone Employment (QoQ) (4Q P)	14-02-2019	10:00	EUR	-	0.002
Euro-Zone Employment (YoY) (4Q P)	14-02-2019	10:00	EUR	-	0.013
Euro-Zone Gross Domestic Product s.a. (QoQ) (4Q P)	14-02-2019	10:00	EUR	-	0.002
Euro-Zone Gross Domestic Product s.a. (YoY) (4Q P)	14-02-2019	10:00	EUR	-	0.012
German Gross Domestic Product n.s.a. (YoY) (4Q P)	14-02-2019	7:00	EUR	-	0.011
German Gross Domestic Product s.a. (QoQ) (4Q P)	14-02-2019	7:00	EUR	-	(0.002)
German Gross Domestic Product w.d.a. (YoY) (4Q P)	14-02-2019	7:00	EUR	-	0.011
German Wholesale Price Index (MoM) (JAN)	14-02-2019	7:00	EUR	-	(0.012)
German Wholesale Price Index (YoY) (JAN)	14-02-2019	7:00	EUR	-	0.025
RICS House Price Balance (JAN)	14-02-2019	0:01	GBP	-	(0.19)
BOE's Vlieghe Speaks on the Economic Outlook	14-02-2019	9:30	GBP	-	-
BOJ Outright Bond Purchase 5~10 Years	14-02-2019	1:10	JPY	-	-
Foreign Buying Japan Bonds (FEB 08)	14-02-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (FEB 08)	14-02-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (FEB 08)	14-02-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (FEB 08)	14-02-2019	23:50	JPY	-	-
BusinessNZ Manufacturing PMI (JAN)	14-02-2019	21:30	NZD	-	55.1
Net Migration s.a. (DEC)	14-02-2019	21:45	NZD	-	2480
Continuing Claims (FEB 02)	14-02-2019	13:30	USD	-	-
Initial Jobless Claims (FEB 09)	14-02-2019	13:30	USD	-	-
PPI Ex Food, Energy, Trade (MoM) (JAN)	14-02-2019	13:30	USD	-	0
PPI Ex Food, Energy, Trade (YoY) (JAN)	14-02-2019	13:30	USD	-	0.000



PPI Final Demand (YoY) (JAN)	14-02-2019	13:30	USD	-	0.025
Producer Price Index Ex Food and Energy (MoM) (JAN)	14-02-2019	13:30	USD	-	(0.001)
Producer Price Index Ex Food and Energy (YoY) (JAN)	14-02-2019	13:30	USD	-	0.027
Producer Price Index Final Demand (MoM) (JAN)	14-02-2019	13:30	USD	-	(0.002)
Retail Sales Advance (MoM) (DEC)	14-02-2019	13:30	USD	-	0.002
Retail Sales Control Group (DEC)	14-02-2019	13:30	USD	-	0.009
Retail Sales Ex Auto (MoM) (DEC)	14-02-2019	13:30	USD	-	0.002
Retail Sales Ex Auto and Gas (DEC)	14-02-2019	13:30	USD	-	0.005
Business Inventories (NOV)	14-02-2019	15:00	USD	-	0.006
EIA Natural Gas Storage Change (FEB 08)	14-02-2019	15:30	USD	-	(237)
Fed's Harker Discusses Approaches to Leadership	14-02-2019	16:00	USD	-	-
U.S. to Sell 4-Week Bills	14-02-2019	16:30	USD	-	-
U.S. to Sell 8-Week Bills	14-02-2019	16:30	USD	-	-

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