



14 Dec.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,771	(0.2) %	5.5 %
BSE SENSEX	35,930	0.4 %	8.0 %
CNX BANK	26,811	(0.0) %	10.2 %
CNX MIDCAP	17,554	0.1 %	(8.1) %
CNX SMALLCAP	6,281	0.0 %	(20.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,597	0.3 %	(0.9) %
S&P 500	2,651	(0.0) %	(1.7) %
FTSE 100	6,878	(0.0) %	(10.1) %
HANG SENG	26,524	1.3 %	(13.1) %
NIKKEI	21,816	1.0 %	(7.2) %
SHANGHAI COMPOSITE	2,634	1.2 %	(21.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.69	(0.3) %	12.6 %
EUR/USD	1.14	0.2 %	(5.4) %
GBP/USD	1.26	1.0 %	(6.6) %
USD/JPY	113.43	(0.1) %	0.6 %
USD/AUD	1.39	0.6 %	8.8 %
USD/SGD	1.37	(0.0) %	2.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	(1.0) %	(15.3) %
Gold(INR/10g)	31,410	(0.5) %	7.0 %
Gold Comex(USD/oz)	1,249	(0.1) %	(4.5) %
SILVER(INR/1Kg)	37,493	(0.0) %	(2.9) %
Aluminium(USD/MT)	1,928	(1.1) %	(14.5) %
Copper(USD/MT)	6,151	(0.2) %	(14.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.5 %

Global Economy: The European Central Bank left its interest rates unchanged on Thursday and confirmed that it will end the asset purchases under the massive EUR 2.6 trillion Asset Purchase Programme in December. Eurozone's growth outlook is likely to face downside risks due to the persistence of uncertainties linked mainly to politics, trade wars and protectionism, European Central Bank President Mario Draghi noted. Switzerland's central bank left its negative interest rate unchanged and trimmed its inflation forecast for next year as it cited a strong franc and downside risks to the economy that could arise from a global slowdown. The Swiss National Bank left its interest on sight deposits unchanged at -0.75% and the target range for the three-month Libor between -1.25% and -0.25%. In the short term, the world economy is set to continue to expand somewhat above potential, benefiting from the clear improvement in the labour market situation and the ongoing expansionary monetary policy in the advanced economies. However, a gradual slowdown is likely in the medium term.

Global Equities: Sentiments remained mostly supported as traders eyed more clarity on the Brexit and some calm on the global trade.

Indian Economy: World Economic Forum (WEF) founder and Executive Chairman Klaus Schwab said India is still in the "middle class" in ease of doing business and the country should work towards creating the necessary ecosystem to boost entrepreneurship. Considering the farm distress and the lower food inflation resulting in lower revenue generation for the farming community, the central government may decide on a farm debt waiver scheme, holistically or selectively in some states, a research update from the SBI noted Thursday. As per the latest data compiled by Solvent Extractors' Association of India (SEA OF India), the import of vegetable oils during November 2018 is reported at 1,133,893 tons compared to 1,256,433 tons in October 2018 and 1,248,810 tons in November, 2017, i.e. down by 9%.

Equity Markets: Domestic stocks logged modest gains following strong domestic economic data. Stocks advanced for third consecutive session boosted by the appointment of new Reserve Bank of India (RBI) governor and as uncertainty surrounding state election outcome receded. The Sensex settled below the psychological 36,000 level after moving above and below that level in intraday trade. The barometer index, the S&P BSE Sensex, rose 150.57 points or 0.42% to settle at 35,929.64. The index hit high of 36,095.56 and low of 35,794.51 in intraday trade. The Nifty 50 index rose 53.95 points or 0.50% to settle at 10,791.55. The index hit high of 10,838.60 and low of 10,749.50 in intraday trade.

Corporate News: Indian Oil Corporation's board approved buyback of equity shares of the company not exceeding 29.76 crore equity shares being approximately 3.06% of the total paid up equity share capital of the company at Rs 149 per share for an aggregate consideration not exceeding Rs 4435 crore on a proportionate basis through the tender offer route. IDFC Bank announced the approval of National Company Law Tribunal to the Composite Scheme of Amalgamation of Capital First, Capital First Home Finance and Capital First Securities with IDFC Bank and their respective shareholders and creditors pursuant to Sections 230 to 232 and other applicable provisions of the Companies Act, 2013. TVS Motor Company Thursday said it has crossed 50,000 production milestone for BMW 310 cc series bikes in less than two years after rolling out the first unit of the range from its Hosur plant. In April 2013, TVS Motor Company and BMW Motorrad signed a long-term strategic partnership to manufacture sub-500cc motorcycles for the global markets.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(204.5)	35.6	(39.6)
MF(INR cr)	1,233.1	206.9	468.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,482	30,470	34,819
F&O(INR cr)	1,823,784	936,728	968,984

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.5	21.0	15.7
NSE VIX	15.6	18.0	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,816	0.6 %	10.2 %	Energy	13,924	0.1 %	4.8 %
IT	14,841	0.7 %	16.8 %	Pharma	8,811	0.1 %	2.2 %
Metals	3,114	(0.6) %	(12.0) %	Finance	11,368	0.8 %	10.8 %
Auto	9,254	1.0 %	(16.3) %	PSU	2,971	1.0 %	4.1 %
FMCG	30,291	0.7 %	14.3 %	Real Estate	237	1.4 %	(20.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bandhan Ba	504	6.8 %	6.0 %	Yes Bank	175	(6.4) %	(43.0) %
Indiabulls	776	5.6 %	(37.6) %	ICICI Lomb	888	(3.5) %	13.3 %
Bharat Ele	84	5.2 %	(41.7) %	Sun Pharma	422	(2.2) %	(16.9) %
Godrej Con	809	4.2 %	8.8 %	UPL	773	(2.1) %	2.8 %
Interglobe	1,060	3.5 %	(20.2) %	S A I L	51	(1.9) %	(29.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Fixed Assets Ex Rural YTD (YoY) (NOV)	14-12-2018	02:00	CNY	-	0.057
Industrial Production (YoY) (NOV)	14-12-2018	02:00	CNY	-	0.059
Industrial Production YTD (YoY) (NOV)	14-12-2018	02:00	CNY	-	0.064
Property Investment (YoY) (NOV)	14-12-2018	02:00	CNY	-	0.097
Retail Sales (YoY) (NOV)	14-12-2018	02:00	CNY	-	0.086
Retail Sales YTD (YoY) (NOV)	14-12-2018	02:00	CNY	-	0.092
Surveyed Jobless Rate (NOV)	14-12-2018	02:00	CNY	-	0.049
EU 25 New Car Registrations (NOV)	14-12-2018	07:00	EUR	-	(0.073)
German Wholesale Price Index (MoM) (NOV)	14-12-2018	07:00	EUR	-	0.003
German Wholesale Price Index (YoY) (NOV)	14-12-2018	07:00	EUR	-	0.04
ECB Vice-President Guindos Speaks in Frankfurt	14-12-2018	08:15	EUR	-	-
Markit France Composite PMI (DEC P)	14-12-2018	08:15	EUR	-	54.2
Markit France Manufacturing PMI (DEC P)	14-12-2018	08:15	EUR	-	50.8
Markit France Services PMI (DEC P)	14-12-2018	08:15	EUR	-	55.1
Markit Eurozone Composite PMI (DEC P)	14-12-2018	08:30	EUR	-	52.7
Markit Eurozone Services PMI (DEC P)	14-12-2018	08:30	EUR	-	53.4
Markit Germany Services PMI (DEC P)	14-12-2018	08:30	EUR	-	53.3
Markit/BME Germany Composite PMI (DEC P)	14-12-2018	08:30	EUR	-	52.3
Markit/BME Germany Manufacturing PMI (DEC P)	14-12-2018	08:30	EUR	-	51.8
Markit Eurozone Manufacturing PMI (DEC P)	14-12-2018	09:00	EUR	-	51.8
ECB's Lautenschlaeger Speaks in Frankfurt	14-12-2018	09:30	EUR	-	-
Euro-Zone Labour Costs (YoY) (3Q)	14-12-2018	10:00	EUR	-	0.022
Nikkei Japan PMI Manufacturing (DEC P)	14-12-2018	00:30	JPY	-	52.2
BOJ Outright Bond Purchase 10~25 Years	14-12-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	14-12-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	14-12-2018	01:10	JPY	-	-
Capacity Utilization (MoM) (OCT)	14-12-2018	04:30	JPY	-	(0.015)
Industrial Production (MoM) (OCT F)	14-12-2018	04:30	JPY	-	0.029
Industrial Production (YoY) (OCT F)	14-12-2018	04:30	JPY	-	0.042



Retail Sales Advance (MoM) (NOV)	14-12-2018	13:30	USD	-	0.008
Retail Sales Control Group (NOV)	14-12-2018	13:30	USD	-	0.003
Retail Sales Ex Auto (MoM) (NOV)	14-12-2018	13:30	USD	-	0.007
Retail Sales Ex Auto and Gas (NOV)	14-12-2018	13:30	USD	-	0.003
Capacity Utilization (NOV)	14-12-2018	14:15	USD	-	0.784
Industrial Production (MoM) (NOV)	14-12-2018	14:15	USD	-	0.001
Manufacturing (SIC) Production (NOV)	14-12-2018	14:15	USD	-	0.003
Markit US Manufacturing PMI (DEC P)	14-12-2018	14:45	USD	-	55.3
Markit US Services PMI (DEC P)	14-12-2018	14:45	USD	-	54.7
Business Inventories (OCT)	14-12-2018	15:00	USD	-	0.003
Baker Hughes U.S. Rig Count (DEC 14)	14-12-2018	18:00	USD	-	1075

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