



15 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,844	1.0 %	6.2 %
BSE SENSEX	35,854	(0.4) %	8.9 %
CNX BANK	27,375	0.5 %	12.5 %
CNX MIDCAP	17,671	0.5 %	(7.5) %
CNX SMALLCAP	6,421	0.7 %	(19.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,910	(0.4) %	2.5 %
S&P 500	2,583	(0.5) %	3.0 %
FTSE 100	6,855	(0.9) %	1.8 %
HANG SENG	26,298	(1.4) %	4.6 %
NIKKEI	20,360	1.0 %	4.1 %
SHANGHAI COMPOSITE	2,536	(0.7) %	2.9 %

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)	51	(2.1) %	8.5 %
Gold(INR/10g)	32,117	0.0 %	1.9 %
Gold Comex(USD/oz)	1,290	0.2 %	(0.0) %
SILVER(INR/1Kg)	39,129	0.0 %	2.3 %
Aluminium(USD/MT)	1,776	(2.2) %	(4.4) %
Copper(USD/MT)	5,861	(1.1) %	0.4 %

FIXED INCOME

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

Global Economy: Organisation for Economic Co-operation and Development's (OECD) Composite leading indicators (CLIs), designed to anticipate turning points in economic activity relative to trend six to nine months ahead, continue to point to easing growth momentum in most major economies. China's exports fell 4.4% from a year earlier in December 2018, marking the biggest monthly drop in two years, while imports also fell 7.6%, marking the biggest decline since July 2016. However, the second largest economy in the world still clocked a trade surplus of \$57 billion in December, the highest in three years. Eurozone's industrial production dropped in November, preliminary data from the statistical office Eurostat showed. Industrial production decreased a seasonally adjusted 1.7% from October, when it rose 0.1%, revised from 0.2%. Production of capital goods registered a 2.3% drop and output of durable consumer goods fell 1.7%. Intermediate goods output dropped 1.2% and non-durable consumer goods slipped by 1%. On a year-on-year basis, industrial production fell a calendar adjusted 3.3% in November after a 1.2% increase.

Global Equities: Stocks started the week on a jittery note as a contraction in Chinese exports and concerns surrounding the ongoing US government shutdown kept investors cautious.

Equity Markets: Local stocks settled with modest losses on first trading day of the week tracking negative global stocks. The barometer index, the S&P BSE Sensex, lost 156.28 points or 0.43% at 35,853.56, as per the provisional closing data. The Nifty 50 index was down 57.35 points or 0.53% at 10,737.60, as per the provisional closing data. Telecom stocks fell. Sentiment was impacted by weak IIP data and negative global stocks.

Indian Economy: According to EY's Private Equity Monthly Deal Tracker, PE/VC investments in 2018 aggregate to US\$ 35.1 billion, surpassing the previous high of US\$ 26.1 billion recorded in 2017 by 35% on the back of significant growth in large deals. The year 2018 recorded eight billion dollar plus deals compared to 11 such deals in previous 12 years combined. PE/VC exits recorded US\$ 26 billion in value, almost equal to the value of exits in the previous three years combined. The cumulative rabi plantings fell by almost 29 lakh hectares (lh) last week, as compared to the corresponding period last year, according to the data released by the Agriculture Ministry. The total planted area till the end of the week remained at 581.5 lh, 4.75% lower than the 610.5 lh in the same period during the previous rabi season. Pulses area is 5.73% lower while the coarse cereals area has plummeted by nearly 16%. The official Wholesale Price Index for 'All Commodities' (Base: 2011-12=100) for the month of December, 2018 declined by 1.4% to 120.1 (provisional) from 121.8 (provisional) for the previous month. The annual rate of inflation, based on monthly WPI, stood at 3.80% (provisional) for the month of December, 2018 (over December, 2017) as compared to 4.64% (provisional) for the previous month and 3.58% during the corresponding month of the previous year. This was the lowest level in eight months for the inflation.

Corporate News: IT stocks could see some buying on the slide in Indian Rupee. The Indian Rupee saw some selling pressure as the local stocks extended their drop. Poor economic data also weighed on the currency. Data showing a sharp drop in IIP in November 2018 also dented sentiment. The Rupee approached 71 per US dollar mark amid these cues. Banks would be in focus after the consumer price inflation eased to 18-month low of 2.19% in December as compared with 2.3% in November due to cheaper fuel and food items.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(88.7)	(36.3)	(36.7)
MF(INR cr)	303.8	360.8	441.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,658	28,085	34,294
F&O(INR cr)	504,355	933,499	967,649

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.1	21.0	16.7
NSE VIX	16.2	15.9	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,248	(0.7) %	12.0 %	Energy	13,865	(0.5) %	4.3 %
IT	14,224	(0.6) %	11.9 %	Pharma	8,949	0.5 %	3.8 %
Metals	2,939	(1.1) %	(17.0) %	Finance	11,590	(0.9) %	12.9 %
Auto	8,850	(0.1) %	(20.0) %	PSU	3,145	(0.5) %	10.2 %
FMCG	30,716	(0.1) %	15.9 %	Real Estate	234	(1.0) %	(20.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	195	6.0 %	(36.2) %	Avenue Sup	1,397	(11.1) %	3.0 %
Dabur Indi	434	2.8 %	29.1 %	Wipro	313	(4.9) %	7.9 %
Infosys	702	2.7 %	23.4 %	GAIL (Indi	325	(4.0) %	0.0 %
Pidilite I	1,135	2.3 %	20.5 %	L&T Fin.Ho	136	(3.7) %	(15.1) %
Interglobe	1,082	2.3 %	(18.6) %	HDFC Stand	392	(3.6) %	(18.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (JAN)	15-01-2019	23:30	AUD	-	104.4
Westpac Consumer Confidence (JAN)	15-01-2019	23:30	AUD	-	0.001
Existing Home Sales (MoM) (DEC)	15-01-2019	14:00	CAD	-	(0.023)
Euro-Zone Trade Balance (euros) (NOV)	15-01-2019	10:00	EUR	-	-
Euro-Zone Trade Balance s.a. (NOV)	15-01-2019	10:00	EUR	-	-
ECB's Draghi Presents 2017 Annual Report in Strasbourg	15-01-2019	15:00	EUR	-	-
Gross Domestic Product NSA (YoY) (2018)	15-01-2019	9:00	EUR	-	0.022
BOJ Outright Bond Purchase 1~3 Years	15-01-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	15-01-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	15-01-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	15-01-2019	1:10	JPY	-	-
Domestic Corporate Goods Price Index (MoM) (DEC)	15-01-2019	23:50	JPY	-	(0.003)
Domestic Corporate Goods Price Index (YoY) (DEC)	15-01-2019	23:50	JPY	-	0.023
Machine Orders (MoM) (NOV)	15-01-2019	23:50	JPY	-	0.076
Machine Orders (YoY) (NOV)	15-01-2019	23:50	JPY	-	0.045
Bankruptcies (YoY) (DEC)	15-01-2019	4:30	JPY	-	0.0605
Machine Tool Orders (YoY) (DEC P)	15-01-2019	6:00	JPY	-	(0.17)
QV House Prices (YoY) (DEC)	15-01-2019	16:00	NZD	-	0.035
Card Spending Retail (MoM) (DEC)	15-01-2019	21:45	NZD	-	(0.004)
NZ Card Spending (MoM) (DEC)	15-01-2019	21:45	NZD	-	(0.002)
Empire Manufacturing (JAN)	15-01-2019	13:30	USD	-	10.9
Producer Price Index Ex Food and Energy (MoM) (DEC)	15-01-2019	13:30	USD	-	0.003
Producer Price Index Ex Food and Energy (YoY) (DEC)	15-01-2019	13:30	USD	-	0.027
Producer Price Index Ex Food, Energy, Trade (MoM) (DEC)	15-01-2019	13:30	USD	-	0.003
Producer Price Index Ex Food, Energy, Trade (YoY) (DEC)	15-01-2019	13:30	USD	-	0.028
Producer Price Index Final Demand (MoM) (DEC)	15-01-2019	13:30	USD	-	0.001
Producer Price Index Final Demand (YoY) (DEC)	15-01-2019	13:30	USD	-	0.025
Fed's Kashkari Speaks on Regional Economy in Minnesota	15-01-2019	16:30	USD	-	-
Fed's Green Speech on Economy and Monetary Policy Outlook	15-01-2019	18:00	USD	-	-



Fed's Kaplan Speaks in Plano, Texas

15-01-2019 18:00

USD

- -

..... **End of Report**

