



15 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,724	(0.2) %	5.0 %
BSE SENSEX	35,876	(0.4) %	7.6 %
CNX BANK	26,860	(0.4) %	10.4 %
CNX MIDCAP	16,273	(0.6) %	(14.8) %
CNX SMALLCAP	5,770	(0.4) %	(27.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,439	(0.4) %	9.1 %
S&P 500	2,746	(0.3) %	9.5 %
FTSE 100	7,197	0.1 %	6.9 %
HANG SENG	28,432	(0.2) %	13.1 %
NIKKEI	21,140	(0.0) %	8.1 %
SHANGHAI COMPOSITE	2,720	(0.1) %	10.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.16	0.6 %	2.5 %
EUR/USD	1.13	(0.4) %	(1.4) %
GBP/USD	1.28	(0.8) %	0.4 %
USD/JPY	110.30	(0.3) %	0.6 %
USD/AUD	1.41	0.3 %	(0.7) %
USD/SGD	1.36	0.2 %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	0.9 %	16.9 %
Gold(INR/10g)	32,824	(0.1) %	4.1 %
Gold Comex(USD/oz)	1,312	0.3 %	1.6 %
SILVER(INR/1Kg)	39,407	(0.3) %	3.0 %
Aluminium(USD/MT)	1,840	(0.0) %	(1.0) %
Copper(USD/MT)	6,120	0.3 %	4.8 %

FIXED INCOME

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

Global Economy: The US Commerce Department said retail sales fell by 1.2% in December after inching up by a revised 0.1% in November. The annual rate of retail sales growth also slowed dramatically to 2.3% in December from 4.1% in November. China's exports surged in January because of a boost in exports to the European Union and Southeast Asia. Some front-loading of orders ahead of the Lunar New Year holiday in February also helped. Data from China's General Administration of Customs released on Thursday showed that January's exports jumped 9.1% from a year earlier. Total imports dropped 1.5% in January from a year earlier, after 7.6% plunge in December. The overall trade surplus narrowed to US\$39.16 billion in January from US\$57.06 billion in December. Eurozone's economic growth in the fourth quarter was in line with the initial estimates released late January. Gross domestic product grew 0.2% from the third quarter, when the economy expanded at the same pace. Compared to the same quarter a year ago, GDP rose 1.2% after a 1.6% increase in the three months to September. The full year growth for 2018 was confirmed at 1.8% versus 2.4% in 2017. Germany's wholesale price inflation slowed for the third straight month in January, to the lowest level in eleven months. The wholesale price index climbed 1.1% year-on-year in January after a 2.5% rise in December. Japan's gross domestic product added a seasonally adjusted 0.3% on quarter in the fourth quarter of 2018, the Cabinet Office said on Thursday, following the 0.6% contraction in the three months prior. On a yearly basis, GDP climbed 1.4% after sinking 2.5% in the third quarter.

Global Equities: Sentiments were steady after recent developments on trade front. The US and China kicked off two days of trade negotiations in Beijing. European markets eyed another Brexit vote.

Indian Economy: Wholesale Price Index (WPI) inflation fell to 10 month low of 2.76% in January, according to government data released Thursday. The WPI inflation stood at 3.8% in December, 2018, and 3.02% in January 2018. Build up inflation rate in the financial year so far was 2.49% compared to a build up rate of 2.47% in the corresponding period of the previous year. As per the latest release from Solvent Extractors' Association of India, the import of vegetable oils during January 2019 is reported at 1,275,259 tons compared to 1,291,141 tons in January 2018, consisting 1,210,603 tons of edible oils and 64,656 tons of non-edible oils i.e. down by 3%. The overall import of vegetable oils during November 2018 to January 2019 is reported at 3,620,316 tons compared to 3,628,734 tons- more or less the same, thanks to higher import duty.

Equity Markets: The market ended on a mixed note as key benchmarks settled with modest losses while mid- and small-cap indices finished with gains. Shares of Yes Bank surged over 30%. The Sensex fell 157.89 points or 0.44% to settle at 35,876.22, its lowest closing level since 30 January 2019. The Nifty 50 index fell 47.60 points or 0.44% to settle at 10,746.05, its lowest closing level since 30 January 2019.

Corporate News: Ashok Leyland's third quarter profit fell sharply by 21.5% YoY due to lower sales performance and lower other income. Profit during the quarter declined to Rs 380.84 crore from Rs 484.86 crore in same period last year. Revenue from operations in Q3 slipped 12% to Rs 6,325 crore YoY as sales volumes during the quarter dropped 6.1% YoY and 15.8% QoQ. Cyient has been positioned as a "Major Contender" in the Everest Group Medical Device Engineering Services PEAK Matrix TM 2019 assessment. Jet Airways reported a Q3 net loss of Rs 587.77 crore, compared to a net profit of Rs 165.2 crore YoY. The airline's Q3 revenues from operations stood at Rs 6147.98 crore, as against Rs 6,086 crore a year ago.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(121.4)	50.4	(29.5)
MF(INR cr)	996.1	149.7	418.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,247	34,545	34,308
F&O(INR cr)	1,589,159	881,489	964,478

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.2	15.8	16.7
NSE VIX	15.8	15.7	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,971	0.3 %	10.9 %	Energy	14,335	(1.7) %	7.9 %
IT	15,862	(1.1) %	24.8 %	Pharma	8,921	0.9 %	3.5 %
Metals	2,734	(0.3) %	(22.8) %	Finance	11,305	(0.6) %	10.2 %
Auto	8,223	0.6 %	(25.6) %	PSU	2,749	0.3 %	(3.7) %
FMCG	29,451	0.0 %	11.1 %	Real Estate	223	0.5 %	(24.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	221	30.6 %	(27.8) %	Oracle Fin	3,627	(4.9) %	(7.9) %
Ashok Leyl	84	7.0 %	(43.0) %	B P C L	316	(4.2) %	(25.4) %
Zee Entert	433	6.2 %	(25.1) %	I O C L	125	(4.0) %	(26.9) %
Indiabulls	657	6.1 %	(47.2) %	Hindalco I	192	(3.3) %	(9.2) %
Sun TV Net	579	4.6 %	(32.7) %	Bharti Air	301	(3.1) %	(23.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
International Securities Transactions (Canadian dollar) (DEC)	15-02-2019	13:30	CAD	-	-
Existing Home Sales (MoM) (JAN)	15-02-2019	14:00	CAD	-	(0.025)
Consumer Price Index (YoY) (JAN)	15-02-2019	1:30	CNY	-	0.019
Producer Price Index (YoY) (JAN)	15-02-2019	1:30	CNY	-	0.009
Euro-Zone Trade Balance (euros) (DEC)	15-02-2019	10:00	EUR	-	-
Euro-Zone Trade Balance s.a. (DEC)	15-02-2019	10:00	EUR	-	-
ECB's Coeure Speaks in New York	15-02-2019	13:00	EUR	-	-
EU 25 New Car Registrations (JAN)	15-02-2019	7:00	EUR	-	(0.084)
Retail Sales Ex Auto Fuel (MoM) (JAN)	15-02-2019	9:30	GBP	-	(0.013)
Retail Sales Ex Auto Fuel (YoY) (JAN)	15-02-2019	9:30	GBP	-	0.026
Retail Sales Inc Auto Fuel (MoM) (JAN)	15-02-2019	9:30	GBP	-	(0.009)
Retail Sales Inc Auto Fuel (YoY) (JAN)	15-02-2019	9:30	GBP	-	0.03
Capacity Utilization (MoM) (DEC)	15-02-2019	4:30	JPY	-	0.01
Industrial Production (MoM) (DEC F)	15-02-2019	4:30	JPY	-	(0.001)
Industrial Production (YoY) (DEC F)	15-02-2019	4:30	JPY	-	(0.019)
Empire Manufacturing (FEB)	15-02-2019	13:30	USD	-	3.9
Export Price Index (MoM) (JAN)	15-02-2019	13:30	USD	-	(0.006)
Export Price Index (YoY) (JAN)	15-02-2019	13:30	USD	-	0.011
Import Price Index (MoM) (JAN)	15-02-2019	13:30	USD	-	(0.01)
Import Price Index (YoY) (JAN)	15-02-2019	13:30	USD	-	(0.006)
Import Price Index ex Petroleum (MoM) (JAN)	15-02-2019	13:30	USD	-	0.003
Capacity Utilization (JAN)	15-02-2019	14:15	USD	-	0.787
Industrial Production (MoM) (JAN)	15-02-2019	14:15	USD	-	0.003
Manufacturing (SIC) Production (JAN)	15-02-2019	14:15	USD	-	0.011
Fed's Bostic to Speak on Workforce Development in Alabama	15-02-2019	14:55	USD	-	-
U. of Mich. 1 Yr Inflation (FEB P)	15-02-2019	15:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (FEB P)	15-02-2019	15:00	USD	-	0.026
U. of Mich. Current Conditions (FEB P)	15-02-2019	15:00	USD	-	108.8
U. of Mich. Expectations (FEB P)	15-02-2019	15:00	USD	-	70.0



U. of Mich. Sentiment (FEB P)	15-02-2019	15:00	USD	-	91.2
Baker Hughes U.S. Rig Count (FEB 15)	15-02-2019	18:00	USD	-	1049
Net Long-term TIC Flows (DEC)	15-02-2019	21:00	USD	-	-
Total Net TIC Flows (DEC)	15-02-2019	21:00	USD	-	-

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