



16 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,899	0.1 %	6.7 %
BSE SENSEX	36,318	1.3 %	9.4 %
CNX BANK	27,401	0.0 %	12.6 %
CNX MIDCAP	17,705	0.0 %	(7.3) %
CNX SMALLCAP	6,450	0.0 %	(18.7) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,066	0.7 %	3.2 %
S&P 500	2,610	1.1 %	4.1 %
FTSE 100	6,895	0.6 %	2.4 %
HANG SENG	26,830	2.0 %	6.8 %
NIKKEI	20,555	1.0 %	5.1 %
SHANGHAI COMPOSITE	2,570	1.4 %	4.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.02	1.0 %	2.3 %
EUR/USD	1.14	(1.1) %	(0.5) %
GBP/USD	1.28	0.6 %	0.7 %
USD/JPY	108.42	0.1 %	(1.1) %
USD/AUD	1.39	0.2 %	(2.2) %
USD/SGD	1.36	0.3 %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	3.5 %	12.4 %
Gold(INR/10g)	32,117	0.0 %	1.9 %
Gold Comex(USD/oz)	1,289	(0.1) %	(0.1) %
SILVER(INR/1Kg)	39,129	0.0 %	2.3 %
Aluminium(USD/MT)	1,811	2.0 %	(2.6) %
Copper(USD/MT)	5,882	0.4 %	0.7 %

FIXED INCOME

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

Global Economy: British lawmakers overwhelmingly rejected Prime Minister Theresa May's separation deal with the European Union on Tuesday, plunging the Brexit process into chaos and triggering a no-confidence vote. New York manufacturing activity grew at its slowest pace in over a year in the month of January, according to a report released by the Federal Reserve Bank of New York on Tuesday. The New York Fed said its general business conditions index slumped to 3.9 in January. Germany's economy grew for a ninth year in 2018, but the expansion was slowest in five years, largely driven by domestic demand, preliminary data from the Federal Statistical Office showed today. Gross domestic product rose a price-adjusted and chain-linked 1.5% from 2017, when it expanded 2.2%. The M2 money stock in Japan was up 2.4% on year in December, the Bank of Japan said on Tuesday - coming in at 1,014.2 trillion yen. This followed the 2.3% gain in November. The M3 money stock climbed an annual 2.1% to 1,011.9 trillion yen - unchanged on the month.

Global Equities: Stocks edged up on reports of fresh fiscal stimulus from China following a recent string of data indicating a sharp slowdown in the world's second-largest economy. European markets saw some cautious trades though as European Central Bank could be set to ask Italian lenders to set aside further capital to deal with impaired loans.

Indian Economy: The overseas direct investment of Indian companies both under Automatic Route and the Approval Route have eased to US\$ 1.64 billion in December 2018 compared with US\$ 1.21 billion in November 2018 and US\$ 3.31 billion in December 2017. The overseas direct investment of Indian companies has dipped to US\$ 15.57 billion in April-December 2018 compared with US\$ 26.62 billion in April-December 2017. India's import of vegetable oils (edible & non-edible) has increased 11% to 12.11 lakh tonnes in December 2018 from 10.89 lakh tonnes in December 2017, as per the data released by Solvent Extractors Association (SEA) of India. The Civil Aviation Minister Suresh Prabhu, while inaugurating the Global Aviation Summit 2019, noted that India is one of the fastest growing aviation sectors and all players of the sector must come together and talk about ideas.

Equity Markets: Local stocks witnessed a strong recovery as all sectoral indices ended in the green, with excellent gains in IT and energy counters. The spurt was triggered on hopes of interest rate cut by RBI after latest data revealed that retail inflation as dropped sharply in December. Positive global stocks also boosted sentiment. The Sensex rose 464.77 points or 1.30% to settle at 36,318.33, its highest closing level since 20 December 2018. The index rose 495.75 points, or 1.38% at the day's high of 36,349.31. The index rose 96.52 points, or 0.27% at the day's low of 35,950.08.

Corporate News: Zee Entertainment Enterprises reported robust Q3 FY19 earnings, with net profit increasing 51% YoY to Rs 563 crore. Revenue increased 18% YoY while EBITDA increased 27% YoY as EBITDA margin improved to 34.8% in Q3 as compared to 32.34% in the same period last year. Essel Propack has received commitment of repayment of outstanding dues of Inter corporate deposit of Rs. 96.06 crores (ICD) from Sprit Infrapower & Multiventures (Sprit). Dr Reddy's Laboratories informed that the US Food and Drug Administration (USFDA) completed audit of the company's formulations Srikakulam plant (SEZ) Unit I, Andhra Pradesh on 15 January 2019. The company has been issued a Form 483 with 4 observations, which the firm is addressing.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(122.2)	(44.9)	(37.2)
MF(INR cr)	832.6	396.8	442.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,319	28,288	34,273
F&O(INR cr)	613,406	904,400	965,841

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.6	20.7	16.7
NSE VIX	15.6	15.9	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,401	0.6 %	12.6 %	Energy	14,163	2.1 %	6.6 %
IT	14,659	3.1 %	15.4 %	Pharma	9,028	0.9 %	4.7 %
Metals	2,986	1.6 %	(15.6) %	Finance	11,675	0.7 %	13.8 %
Auto	8,888	0.4 %	(19.6) %	PSU	3,151	0.2 %	10.4 %
FMCG	31,011	1.0 %	17.0 %	Real Estate	239	1.8 %	(19.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Wipro	330	5.5 %	13.9 %	Dabur Indi	426	(1.7) %	26.9 %
Yes Bank	203	3.9 %	(33.7) %	Bharat Ele	90	(1.5) %	(37.7) %
Tech Mahin	706	3.9 %	10.3 %	HDFC Stand	388	(1.2) %	(19.7) %
L&T Fin.Ho	141	3.5 %	(12.1) %	A B B	1,293	(1.1) %	0.0 %
Infosys	727	3.5 %	27.8 %	Havells In	681	(1.1) %	34.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
New Home Prices (MoM) (DEC)	16-01-2019	1:30	CNY	-	0.0098
EU 25 New Car Registrations (DEC)	16-01-2019	7:00	EUR	-	(0.08)
German Consumer Price Index (MoM) (DEC F)	16-01-2019	7:00	EUR	-	0.001
German Consumer Price Index (YoY) (DEC F)	16-01-2019	7:00	EUR	-	0.017
BOE Governor Carney Testifies on Financial Stability Report	16-01-2019	9:15	GBP	-	-
Consumer Price Index (MoM) (DEC)	16-01-2019	9:30	GBP	-	0.002
Consumer Price Index (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.023
Consumer Price Index Including Housing Costs (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.022
Core Consumer Price Index (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.018
House Price Index (YoY) (NOV)	16-01-2019	9:30	GBP	-	0.027
Producer Price Index Input n.s.a. (MoM) (DEC)	16-01-2019	9:30	GBP	-	(0.023)
Producer Price Index Input n.s.a. (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.056
Producer Price Index Output Core n.s.a. (MoM) (DEC)	16-01-2019	9:30	GBP	-	0.001
Producer Price Index Output Core n.s.a. (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.024
Producer Price Index Output n.s.a. (MoM) (DEC)	16-01-2019	9:30	GBP	-	0.002
Producer Price Index Output n.s.a. (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.031
Retail Price Index (DEC)	16-01-2019	9:30	GBP	-	284.6
Retail Price Index (MoM) (DEC)	16-01-2019	9:30	GBP	-	0
Retail Price Index (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.032
Retail Price Index Ex Mort Int.Payments (YoY) (DEC)	16-01-2019	9:30	GBP	-	0.031
Tertiary Industry Index (MoM) (NOV)	16-01-2019	4:30	JPY	-	0.019
REINZ House Sales (YoY) (DEC)	16-01-2019	20:00	NZD	-	0.026
MBA Mortgage Applications (JAN 11)	16-01-2019	12:00	USD	-	0.235
Export Price Index (MoM) (DEC)	16-01-2019	13:30	USD	-	(0.009)
Export Price Index (YoY) (DEC)	16-01-2019	13:30	USD	-	0.018
Import Price Index (MoM) (DEC)	16-01-2019	13:30	USD	-	(0.016)
Import Price Index (YoY) (DEC)	16-01-2019	13:30	USD	-	0.007
Import Price Index ex Petroleum (MoM) (DEC)	16-01-2019	13:30	USD	-	(0.003)
Retail Sales Adj. (MoM) (DEC)	16-01-2019	13:30	USD	-	0.002



Retail Sales Control Group (DEC)	16-01-2019	13:30	USD	-	0.009
Retail Sales Ex Auto (MoM) (DEC)	16-01-2019	13:30	USD	-	0.002
Retail Sales Ex Auto and Gas (DEC)	16-01-2019	13:30	USD	-	0.005
Business Inventories (NOV)	16-01-2019	15:00	USD	-	0.006
NAHB Housing Market Index (JAN)	16-01-2019	15:00	USD	-	56
DOE Cushing OK Crude Inventory (JAN 11)	16-01-2019	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 11)	16-01-2019	15:30	USD	-	-
DOE U.S. Distillate Inventory (JAN 11)	16-01-2019	15:30	USD	-	-
DOE U.S. Gasoline Inventories (JAN 11)	16-01-2019	15:30	USD	-	-
U.S. Federal Reserve Releases Beige Book	16-01-2019	19:00	USD	-	-
Net Long-term TIC Flows (NOV)	16-01-2019	21:00	USD	-	-
Total Net TIC Flows (NOV)	16-01-2019	21:00	USD	-	-
Fed's Kashkari Speaks About 10th Anniversary of Crisis	16-01-2019	23:30	USD	-	-

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