



17 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,909	0.2 %	6.8 %
BSE SENSEX	36,321	0.0 %	9.5 %
CNX BANK	27,483	(0.0) %	13.0 %
CNX MIDCAP	17,725	0.2 %	(7.2) %
CNX SMALLCAP	6,466	0.2 %	(18.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,207	0.6 %	3.8 %
S&P 500	2,616	0.2 %	4.4 %
FTSE 100	6,863	(0.5) %	1.9 %
HANG SENG	26,902	0.3 %	7.1 %
NIKKEI	20,443	(0.6) %	4.5 %
SHANGHAI COMPOSITE	2,570	0.0 %	4.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.24	1.1 %	2.6 %
EUR/USD	1.14	(0.7) %	(0.5) %
GBP/USD	1.29	0.3 %	1.0 %
USD/JPY	108.94	0.4 %	(0.6) %
USD/AUD	1.40	0.7 %	(1.8) %
USD/SGD	1.36	0.2 %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(0.6) %	12.4 %
Gold(INR/10g)	32,351	0.7 %	2.6 %
Gold Comex(USD/oz)	1,293	0.3 %	0.2 %
SILVER(INR/1Kg)	39,296	0.4 %	2.7 %
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: Economic activity has continued to increase in most of the US, according to the Federal Reserve's Beige Book, although the report also hinted at deterioration in optimism. The Beige Book, a compilation of anecdotal evidence on economic conditions in the twelve Fed districts, said eight of the twelve districts reported modest to moderate growth. While most districts indicated a continued expansion in manufacturing, the pace of growth slowed, particularly in the auto and energy sectors. The central bank also said new home construction, existing home sales, and commercial real estate activity were all little changed. The NAHB/Wells Fargo Housing Market Index rose to 58 in January after tumbling to 56 in December. European new passenger car registrations decreased for a fourth straight month in December the European Automobile Manufacturers Association, or ACEA, showed New car registrations decreased 8.4% year-on-year in December following an 8% decrease in November.

Global Equities: US stocks edged up for a second straight day as Goldman Sachs Group led a rally in bank stocks and China's steps to bolster growth supported global equities.

Indian Economy: The Scheduled commercial banks (SCBs) credit growth moderated on sequential basis to 14.54% YoY to Rs 93384.4 crore as on 04 January 2019, compared with 15.11% growth as on 21 December 2018. However, the credit growth is showing sharp improvement from 10.14% at end January 2018. Non-food credit, accounting for 99.23% of the share of the total credit, recorded a growth of 14.46% , YoY, at Rs 92661.0 billion as on 04 January 2019 as against a rise of 15.10% fortnight ago and 10.97% rise a year ago.

Equity Markets: Key equity indices ended almost flat after a volatile trading session. Losses in Hindustan Unilever, ITC and HDFC offset gains in Infosys, ICICI Bank and IndusInd Bank. The Sensex rose 2.96 points or 0.01% to settle at 36,321.29. The index rose 143.70 points, or 0.40% at the day's high of 36,462.03. The index fell 39.72 points, or 0.11% at the day's low of 36,278.61.

Corporate News: Hindustan Unilever (HUL) and Reliance Industries (RIL) will declare their results today, 17 January 2019. Bank of India said it will issue shares at Rs 105.75 per share in respect of preferential issue of equity shares amounting to Rs 10086 crore to the Government of India, as a part of the capital infusion plan. Mindtree reported 7.3% fall in consolidated net profit to Rs 191.2 crore on 1.8% rise in revenue to Rs 1787.20 crore in Q3 December 2018 over Q2 September 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	50.6	(36.2)	(36.7)
MF(INR cr)	887.4	441.4	444.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,937	28,426	34,251
F&O(INR cr)	745,712	891,176	964,724

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.0	20.6	16.7
NSE VIX	16.1	15.9	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,484	0.3 %	13.0 %	Energy	14,243	0.6 %	7.2 %
IT	14,708	0.3 %	15.7 %	Pharma	9,054	0.3 %	5.0 %
Metals	2,967	(0.6) %	(16.2) %	Finance	11,653	(0.2) %	13.6 %
Auto	8,867	(0.2) %	(19.8) %	PSU	3,170	0.6 %	11.1 %
FMCG	30,784	(0.7) %	16.2 %	Real Estate	239	0.0 %	(19.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	1,137	4.9 %	(14.5) %	JSW Steel	286	(1.9) %	(3.4) %
Yes Bank	208	2.6 %	(32.0) %	DLF	183	(1.6) %	(9.0) %
Petronet L	221	2.6 %	(4.5) %	ICICI Pru	347	(1.6) %	(9.7) %
Indiabulls	830	2.6 %	(33.3) %	United Spi	595	(1.5) %	(8.9) %
Container	697	2.2 %	12.3 %	Bharat Ele	89	(1.4) %	(38.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (JAN)	17-01-2019	0:00	AUD	-	0.04
Home Loans (MoM) (NOV)	17-01-2019	0:30	AUD	-	0.022
Investment Lending (NOV)	17-01-2019	0:30	AUD	-	0.006
RBA Foreign Exchange Transaction (Australian dollar) (DEC)	17-01-2019	0:30	AUD	-	-
RBA FX Transactions Government (DEC)	17-01-2019	0:30	AUD	-	-
RBA FX Transactions Other (DEC)	17-01-2019	0:30	AUD	-	-
Value of Loans (MoM) (NOV)	17-01-2019	0:30	AUD	-	0.035
Euro-Zone Construction Output s.a. (MoM) (NOV)	17-01-2019	10:00	EUR	-	(0.016)
Euro-Zone Construction Output w.d.a. (YoY) (NOV)	17-01-2019	10:00	EUR	-	0.018
Euro-Zone Consumer Price Index (MoM) (DEC)	17-01-2019	10:00	EUR	-	(0.002)
Euro-Zone Consumer Price Index (YoY) (DEC F)	17-01-2019	10:00	EUR	-	0.019
Euro-Zone Consumer Price Index Core (YoY) (DEC F)	17-01-2019	10:00	EUR	-	0.01
ECB's Lautenschlaeger Speaks in Dublin	17-01-2019	11:00	EUR	-	-
RICS House Price Balance (DEC)	17-01-2019	0:01	GBP	-	(0.11)
Bank of England Credit Conditions & Bank Liabilities Surveys	17-01-2019	9:30	GBP	-	-
BOJ Kuroda and Amamiya make a speech at G20 Symposium	17-01-2019	0:00	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	17-01-2019	1:10	JPY	-	-
National Consumer Price Index (YoY) (DEC)	17-01-2019	23:30	JPY	-	0.008
National Consumer Price Index Ex-Fresh Food (YoY) (DEC)	17-01-2019	23:30	JPY	-	0.009
Natl Consumer Price Index Ex Fresh Food, Energy (YoY) (DEC)	17-01-2019	23:30	JPY	-	0.003
Foreign Buying Japan Bonds (JAN 11)	17-01-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JAN 11)	17-01-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JAN 11)	17-01-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JAN 11)	17-01-2019	23:50	JPY	-	-
BusinessNZ Manufacturing PMI (DEC)	17-01-2019	21:30	NZD	-	53.5
Building Permits (DEC)	17-01-2019	13:30	USD	-	-
Building Permits (MoM) (DEC)	17-01-2019	13:30	USD	-	0.05
Continuing Claims (JAN 5)	17-01-2019	13:30	USD	-	-
U.S. Housing Starts (DEC)	17-01-2019	13:30	USD	-	-



Housing Starts (MoM) (DEC)	17-01-2019	13:30	USD	-	0.032
Initial Jobless Claims (JAN 12)	17-01-2019	13:30	USD	-	-
Philadelphia Fed Business Outlook (JAN)	17-01-2019	13:30	USD	-	9.4
EIA Natural Gas Storage Change (JAN 11)	17-01-2019	15:30	USD	-	(91)
EIA Working Natural Gas Implied Flow (JAN 11)	17-01-2019	15:30	USD	-	(87)
Fed's Quarles Speaks at Insurance Industry Forum	17-01-2019	15:45	USD	-	-
U.S. to Sell 4-Week Bills	17-01-2019	16:30	USD	-	-
U.S. to Sell 8-Week Bills	17-01-2019	16:30	USD	-	-
U.S. to Sell USD13 Bln 10-Year TIPS	17-01-2019	18:00	USD	-	-

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