



17 Dec.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|----------|
| CNX NIFTY | 10,860 | 0.5 % | 6.3 % |
| BSE SENSEX | 35,963 | 0.1 % | 8.8 % |
| CNX BANK | 26,974 | 0.6 % | 10.9 % |
| CNX MIDCAP | 17,684 | 0.5 % | (7.4) % |
| CNX SMALLCAP | 6,303 | 0.4 % | (20.5) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 24,101 | (2.0) % | (2.9) % |
| S&P 500 | 2,600 | (1.9) % | (3.6) % |
| FTSE 100 | 6,845 | (0.5) % | (10.5) % |
| HANG SENG | 26,095 | (1.6) % | (14.5) % |
| NIKKEI | 21,375 | (2.0) % | (9.1) % |
| SHANGHAI COMPOSITE | 2,594 | (1.5) % | (22.5) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 71.90 | 0.3 % | 12.9 % |
| EUR/USD | 1.13 | (0.5) % | (5.9) % |
| GBP/USD | 1.26 | (0.4) % | (6.9) % |
| USD/JPY | 113.39 | (0.0) % | 0.6 % |
| USD/AUD | 1.39 | 0.2 % | 9.0 % |
| USD/SGD | 1.38 | 0.3 % | 3.1 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 51 | (2.6) % | (15.2) % |
| Gold(INR/10g) | 31,374 | (0.1) % | 6.9 % |
| Gold Comex(USD/oz) | 1,242 | (0.3) % | (5.1) % |
| SILVER(INR/1Kg) | 37,375 | (0.3) % | (3.2) % |
| Aluminium(USD/MT) | 1,908 | (0.8) % | (15.4) % |
| Copper(USD/MT) | 6,104 | (1.5) % | (15.0) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec US 10 | 2.9 | (0.0) % | 0.4 % |

Global Economy: The Fed said industrial production climbed by 0.6 percent in November while the data for October was revised to show a 0.2% drop compared to the previously reported 0.1% gain. The Commerce Department said retail sales edged up by 0.2% in November after spiking by an upwardly revised 1.1% in October. China's value-added industrial output grew by 5.4% year on year in November. This was the slowest mark in nearly three years. The growth rate was 0.5 percentage points lower than that recorded in October, according to data released by the National Bureau of Statistics (NBS). On a monthly basis, the industrial output edged up 0.36% from October. In the first 11 months, industrial output rose 6.3% from one year earlier, with the pace of growth moderating from 6.2% registered during the January-October period. Manufacturing output rose 5.6% year on year, down from 6.1% in October. Chinese Retail sales grew by 8.1% in November from a year earlier, growing at the slowest pace since 2003. However, the country's Fixed-asset investment growth hit a five-month high of 5.9% in first eleven months of the year. This is still below the 7.2% growth recorded in last year. Eurozone private sector grew at the slowest pace in more than four years during December, suggesting that the 19-nation economy is set to end this year with a whimper. The flash Composite purchasing managers' index, or PMI, which combines manufacturing and services, fell to a 49-month low of 51.3 from 52.7 in November, survey data from IHS Markit showed.

Global Equities: The Dow and the S&P 500 fell to their lowest closing levels in seven and eight months, respectively.

Indian Economy: The official Wholesale Price Index (WPI) (Base: 2011-12=100) for the month of November, 2018 rose by 0.1% to 121.8 (provisional) from 121.7 (provisional) for the previous month. The annual rate of inflation, based on monthly WPI, stood at 4.64% (provisional) for the month of November, 2018 (over November, 2017) as compared to 5.28% (provisional) for the previous month and 4.02% during the corresponding month of the previous year. The current level is lowest in last three months. Build up inflation rate in the financial year so far was 4.73% compared to a build up rate of 2.83% in the corresponding period of the previous year.

Equity Market: Domestic shares ended with small gains, continuing their winning streak for a fourth day. Negative cues from global markets and profit booking by investors after a three-day rally kept the key indices under pressure. The Sensex ended below the psychological 36,000 mark after moving above and below that level in intraday trade. The Nifty ended a tad above 10,800 mark. The Sensex rose 33.29 points or 0.09% to settle at 35,962.93, its highest closing level since 4 December 2018.

Corporate News: Reliance Industries will be watched. With reference to the outcome of a litigation by Airtel and Idea challenging the amendments made by TRAI to the Telecom Tariff Order 1999, Reliance Jio Infocomm, subsidiary of the company, had impleaded itself in the case to put forth its point of view. Cadila Healthcare announced that Zydus Cadila has received the final approval from the US Food and Drug Administration (US FDA) to market Albendazole Tablets USP (US RLD – ALBENZA tablets), 200 mg. It will be manufactured at the group's formulations manufacturing facility at SEZ, Ahmedabad. Bharti Airtel announced that its board will meet on 20 December 2018 to consider various fund raising options for the company as the board may deem appropriate. The announcement was made on Saturday, 15 December 2018.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 57.8 | 38.1 | (39.0) |
| MF(INR cr) | (117.2) | 170.9 | 465.5 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 31,740 | 30,597 | 34,801 |
| F&O(INR cr) | 480,579 | 891,113 | 966,194 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 21.6 | 21.0 | 15.8 |
| NSE VIX | 15.2 | 17.8 | 15.0 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 26,826 | 0.0 % | 10.3 % | Energy | 14,072 | 1.1 % | 5.9 % |
| IT | 14,851 | 0.1 % | 16.9 % | Pharma | 8,726 | (1.0) % | 1.2 % |
| Metals | 3,112 | (0.1) % | (12.1) % | Finance | 11,328 | (0.4) % | 10.4 % |
| Auto | 9,272 | 0.2 % | (16.2) % | PSU | 2,980 | 0.3 % | 4.4 % |
| FMCG | 30,372 | 0.3 % | 14.6 % | Real Estate | 237 | 0.3 % | (20.0) % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Bandhan Ba | 534 | 5.9 % | 12.2 % | Aurobindo | 726 | (3.3) % | 22.6 % |
| Bharti Air | 319 | 5.3 % | (19.2) % | Bharat Ele | 82 | (2.4) % | (43.1) % |
| Vodafone I | 36 | 3.7 % | (53.5) % | Hind.Zinc | 269 | (2.3) % | (11.2) % |
| Yes Bank | 180 | 3.2 % | (41.1) % | H D F C | 1,904 | (2.0) % | 3.6 % |
| B P C L | 345 | 3.1 % | (18.4) % | Piramal En | 2,138 | (1.9) % | (13.5) % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

..... End of Report