



18 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,915	0.1 %	6.9 %
BSE SENSEX	36,374	0.1 %	9.5 %
CNX BANK	27,550	0.1 %	13.2 %
CNX MIDCAP	17,678	0.2 %	(7.4) %
CNX SMALLCAP	6,448	0.1 %	(18.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,370	0.7 %	4.5 %
S&P 500	2,636	0.8 %	5.2 %
FTSE 100	6,835	(0.4) %	1.5 %
HANG SENG	26,756	(0.5) %	6.5 %
NIKKEI	20,402	(0.2) %	4.3 %
SHANGHAI COMPOSITE	2,560	(0.4) %	3.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.04	0.0 %	2.3 %
EUR/USD	1.14	(0.0) %	(0.5) %
GBP/USD	1.30	1.1 %	1.9 %
USD/JPY	109.32	0.8 %	(0.3) %
USD/AUD	1.39	(0.1) %	(2.3) %
USD/SGD	1.36	0.0 %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(0.5) %	11.9 %
Gold(INR/10g)	32,396	0.1 %	2.7 %
Gold Comex(USD/oz)	1,291	(0.2) %	0.0 %
SILVER(INR/1Kg)	39,220	(0.2) %	2.5 %
Aluminium(USD/MT)	1,804	(1.9) %	(2.9) %
Copper(USD/MT)	5,933	0.4 %	1.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.1 %

Global Economy: The Philly Fed said its index for current manufacturing activity in the region jumped to 17.0 in January from 9.1 in December, with a positive reading indicating growth. Eurozone inflation slowed to 1.6% in December from last year, Eurostat said, confirming its preliminary estimates released earlier in January. UK consumer price inflation eased to 2.1% from 2.3% in November, figures from the Office for National Statistics showed on Wednesday, to its weakest level in nearly two years in December, driven by a big fall in fuel prices. Core inflation, which excludes prices of energy, food, alcoholic beverages and tobacco, climbed to 1.9% from 1.8%. The latest CPI inflation figure was the lowest since January 2017, when it was 1.8%. Inflation peaked at 3.1% in November 2017. UK housing market is set remain sluggish over the coming three months as sales expectations sunk to a two-decade low amid weaker outlook for prices, thanks to the persistent uncertainty surrounding Brexit. Home sale expectations for the next three months decreased to -28%, which was the weakest reading since the series began in 1999, the Royal Institution of Chartered Surveyors said. Singapore's exports declined the most in over two years in December, signaling that the preliminary growth estimate for the fourth quarter of 2018 will be revised down. Non-oil domestic exports, or NODX, dropped 8.5% year-on-year following a revised 2.8% fall in November. The total number of home loans issued in Australia was down a seasonally adjusted 0.9% on month in November, the Australian Bureau of Statistics said - coming in at 51,967, following the 2.2% gain in October.

Global Equities: The US-China trade tensions yet again made headlines after media reports suggested the US is pursuing criminal charges against Huawei for alleged theft of trade.

Indian Economy: FICCI urged the Reserve Bank of India (RBI) to consider cutting the repo rate and CRR to enable lowering of lending rates by banks. FICCI delegation led by Sandip Somany, President, FICCI, congratulated RBI Governor, Shaktikanta Das for calling the meeting of the industry chambers to discuss the current economic scenario. The Indian economy is expected to grow at 7.5% in FY20, a pace similar to the Centre's growth projection for the current financial year, India Ratings said in a latest update. The Governor of Maharashtra CH. Vidyasagar Rao has said that the aviation sector is going to be the growth engine for future progress and development. The global aviation industry is ushering in an era of rapid expansion. The International Civil Aviation Organization has predicted a 100% increase in global air travel by the year 2030, he added.

Equity Markets: Local stocks nudged higher on positive Asian stocks though the overall mood was cautious after recent gains. Key indices settled with small gains after a volatile session of trade. The barometer index, the S&P BSE Sensex, rose 52.79 points or 0.15% to settle at 36,374.08. The Nifty 50 index rose 14.90 points or 0.14% to settle at 10,905.20.

Corporate News: Reliance Industries' (RIL) net profit increased 8.82% to Rs 10251 crore on 56.69% increase in net sales to Rs 156397 crore in Q3 December 2018 over Q3 December 2017. Increase in revenue is primarily on account of higher price realizations and volumes for petrochemical and refining businesses along with continuing strong growth momentum in consumer businesses. Product prices for the refining and petrochemicals business increased in line with 10.4% higher average Brent crude oil price. Hindustan Unilever's (HUL) net profit rose 8.9% to Rs 1444 crore on 12.4% increase in net sales to Rs 9357 crore in Q3 December 2018 over Q3 December 2017. Earnings before interest, tax, depreciation and amortisation (EBITDA) rose 22% to Rs 2046 crore in Q3 December 2018 over Q3 December 2017. Prudent management of volatility in costs (crude and currency led) along with improved mix and operating leverage has driven margin improvement, the company said.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(10.0)	(34.0)	(36.6)
MF(INR cr)	242.7	424.8	443.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,047	28,551	34,230
F&O(INR cr)	1,748,185	957,100	968,681

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.1	20.4	16.7
NSE VIX	16.2	15.9	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,529	0.2 %	13.2 %	Energy	14,258	0.1 %	7.3 %
IT	14,800	0.6 %	16.5 %	Pharma	8,931	(1.4) %	3.6 %
Metals	2,963	(0.1) %	(16.3) %	Finance	11,704	0.4 %	14.1 %
Auto	8,878	0.1 %	(19.7) %	PSU	3,120	(1.6) %	9.3 %
FMCG	30,737	(0.2) %	16.0 %	Real Estate	241	1.2 %	(18.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
B H E L	70	2.6 %	(14.9) %	Sun Pharma	427	(6.0) %	(16.0) %
Godrej Con	793	2.4 %	6.7 %	Yes Bank	202	(3.3) %	(34.2) %
B P C L	355	2.3 %	(16.1) %	Shriram Tr	1,150	(3.3) %	(21.7) %
GAIL (Indi	332	2.1 %	2.3 %	Zee Entert	441	(2.5) %	(23.8) %
Axis Bank	677	1.9 %	35.6 %	Interglobe	1,113	(2.1) %	(16.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (DEC)	18-01-2019	13:30	CAD	-	133.5
Consumer Price Index (YoY) (DEC)	18-01-2019	13:30	CAD	-	0.017
Consumer Price Index Core - Median (YoY) (DEC)	18-01-2019	13:30	CAD	-	0.019
Consumer Price Index Core - Trim (YoY) (DEC)	18-01-2019	13:30	CAD	-	0.019
Consumer Price Index Core (YoY) (DEC)	18-01-2019	13:30	CAD	-	0.019
Consumer Price Index n.s.a. (MoM) (DEC)	18-01-2019	13:30	CAD	-	(0.004)
International Securities Transactions (Canadian dollar) (NOV)	18-01-2019	13:30	CAD	-	-
Producer & Import Prices (MoM) (DEC)	18-01-2019	7:30	CHF	-	(0.003)
Producer & Import Prices (YoY) (DEC)	18-01-2019	7:30	CHF	-	0.014
Euro-Zone Current Account s.a. (euros) (NOV)	18-01-2019	9:00	EUR	-	-
Retail Sales Ex Auto Fuel (MoM) (DEC)	18-01-2019	9:30	GBP	-	0.012
Retail Sales Ex Auto Fuel (YoY) (DEC)	18-01-2019	9:30	GBP	-	0.038
Retail Sales Inc Auto Fuel (MoM) (DEC)	18-01-2019	9:30	GBP	-	0.014
Retail Sales Inc Auto Fuel (YoY) (DEC)	18-01-2019	9:30	GBP	-	0.036
Capacity Utilization (MoM) (NOV)	18-01-2019	4:30	JPY	-	0.04
Industrial Production (MoM) (NOV F)	18-01-2019	4:30	JPY	-	(0.011)
Industrial Production (YoY) (NOV F)	18-01-2019	4:30	JPY	-	0.014
Non Resident Bond Holdings (DEC)	18-01-2019	2:00	NZD	-	0.562
Fed's Williams Speaks on Economic Outlook and Monetary Policy	18-01-2019	14:05	USD	-	-
Capacity Utilization (DEC)	18-01-2019	14:15	USD	-	0.785
Industrial Production (MoM) (DEC)	18-01-2019	14:15	USD	-	0.006
Manufacturing (SIC) Production (DEC)	18-01-2019	14:15	USD	-	0
U. of Mich. 1 Yr Inflation (JAN P)	18-01-2019	15:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (JAN P)	18-01-2019	15:00	USD	-	0.025
U. of Mich. Current Conditions (JAN P)	18-01-2019	15:00	USD	-	116.1
U. of Mich. Expectations (JAN P)	18-01-2019	15:00	USD	-	87
U. of Mich. Sentiment (JAN P)	18-01-2019	15:00	USD	-	98.3
Fed's Harker Speaks Symposium on Prosperity	18-01-2019	16:00	USD	-	-
Reliance Industries Ltd. Q4 Results (JAN 18)	18-01-2019	18:00	USD	-	1.075



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