



18 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,724	(0.2) %	5.0 %
BSE SENSEX	35,809	(0.2) %	7.7 %
CNX BANK	26,794	(0.7) %	10.1 %
CNX MIDCAP	16,215	(1.0) %	(15.1) %
CNX SMALLCAP	5,727	(1.2) %	(27.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,883	1.7 %	11.0 %
S&P 500	2,776	1.1 %	10.7 %
FTSE 100	7,237	0.6 %	7.5 %
HANG SENG	27,901	(1.9) %	11.0 %
NIKKEI	20,901	(1.1) %	6.8 %
SHANGHAI COMPOSITE	2,682	(1.4) %	8.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.23	0.1 %	2.6 %
EUR/USD	1.13	0.1 %	(1.3) %
GBP/USD	1.29	0.8 %	1.1 %
USD/JPY	110.46	0.1 %	0.8 %
USD/AUD	1.40	(0.8) %	(1.5) %
USD/SGD	1.36	(0.2) %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	1.6 %	18.8 %
Gold(INR/10g)	33,193	1.1 %	5.3 %
Gold Comex(USD/oz)	1,319	0.5 %	2.2 %
SILVER(INR/1Kg)	39,767	0.9 %	3.9 %
Aluminium(USD/MT)	1,829	(0.0) %	(1.6) %
Copper(USD/MT)	6,190	0.2 %	6.0 %

FIXED INCOME

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

Global Economy: After reporting a notable deterioration in US consumer sentiment in the previous month, the University of Michigan released preliminary data showing a bigger than expected rebound in sentiment in the month of February. The report said the consumer sentiment index soared to 95.5 in February after tumbling to 91.2 in January. The US Fed said industrial production slipped by 0.6% in January after inching up by a downwardly revised 0.1% in December. The Federal Reserve Bank of New York said its general business conditions index rose to 8.8 in February from 3.9 in January, with a positive reading indicating growth in regional manufacturing activity. The increase by the index came after it tumbled to its lowest level in well over a year in the previous month. UK retail sales recovered strongly in January on robust clothing and footwear sales supported by price cuts, preliminary data from the Office for National Statistics showed on Friday. Retail sales including auto fuel rose 1% from December, when they fell 0.7%. On a year-on-year basis, retail sales including auto fuel rose 4.2% in January, which was the biggest increase since December 2016.

Global Equities: DOW soared more than 1% on hopes of a trade deal. The benchmark has now rallied for eight straight weeks. Energy shares were supported on higher oil prices.

Indian Economy: India's merchandise exports rose 3.7% to US\$ 26.36 billion in January 2019 over a year ago. Meanwhile, merchandise imports were flat at US\$ 41.09 billion. The trade deficit declined 6.1% to US\$ 14.73 billion in January 2019 from US\$ 16.30 billion in January 2018. Oil imports declined 3.6% to US\$ 11.24 billion, while the non-oil imports rose 1.4% to US\$ 29.85 billion in January 2019 over January 2018. The share of oil imports in total imports was 27.4% in January 2019, compared with 28.7% in January 2018. A latest research report from the State Bank Of India (SBI) indicates that domestic currency in circulation (CIC) at Rs 20.4 trillion is still short of trend CIC by at least Rs 1.5 lakh crore. Thus, any argument of cash coming back aggressively into the system and financing informal activities is not entirely correct, noted the report. Even though CIC has expanded, income velocity of money has shown a sharp plunge. In principle, the declining velocity indicates that money is not getting adequately circulated in the economy.

Equity Markets: Local stocks ended with modest losses led by slide index pivotsals HDFC, Sun Pharmaceutical Industries and HDFC Bank. Intraday volatility was high. Shares of index heavyweight HDFC dropped. Global stocks were mixed. The barometer index, the S&P BSE Sensex, fell 67.27 points or 0.19% to settle at 35,808.95. The Nifty 50 index fell 21.65 points or 0.2% to settle at 10,724.40.

Corporate News: Local oil marketing companies can stay under continued pressure on rising oil prices. Crude oil futures surged on worries over reductions to global output, hitting around \$56 per barrel - hitting near two and half month high. Mahindra & Mahindra has entered 40,000 units compact SUV segment with its XUV 300. Tech Mahindra is to consider buyback of shares on February 21. The company has also withdrawn scheme application filed with National Company Law Tribunal for the proposed scheme of Merger by Absorption between subsidiary Tech Mahindra Growth Factories Limited with the company. Lumax Industries: Board decided to put an in-house electronic facility for manufacturing of PCBs (a critical part to lighting systems) for its captive consumption, keeping in view the increased focus on electronic content in the automobiles, due to requests from OEMs.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(94.7)	35.9	(29.8)
MF(INR cr)	1,424.8	320.8	425.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,989	34,767	34,320
F&O(INR cr)	739,087	868,543	963,449

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.9	15.7	16.7
NSE VIX	16.5	15.8	15.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,794	(0.7) %	10.1 %	Energy	14,618	2.0 %	10.0 %
IT	15,816	(0.3) %	24.5 %	Pharma	8,643	(3.1) %	0.3 %
Metals	2,677	(2.1) %	(24.4) %	Finance	11,214	(0.8) %	9.3 %
Auto	8,133	(1.1) %	(26.5) %	PSU	2,694	(2.0) %	(5.6) %
FMCG	29,309	(0.5) %	10.6 %	Real Estate	223	(0.2) %	(24.9) %

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>
B P C L	328	3.9 %	(22.6) %	Sun TV Net	547	(5.5) %	(36.4) %
NTPC	136	3.8 %	(20.0) %	Ashok Leyl	80	(5.3) %	(46.0) %
Power Grid	182	3.7 %	(6.9) %	Vodafone I	30	(5.2) %	(61.4) %
Bharti Inf	307	3.3 %	(9.1) %	JSW Steel	267	(4.9) %	(10.0) %
GAIL (Indi	318	3.2 %	(2.2) %	Lupin	775	(4.4) %	(0.3) %

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					

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