



19 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,676	0.3 %	4.6 %
BSE SENSEX	35,498	(0.9) %	7.1 %
CNX BANK	26,790	0.5 %	10.1 %
CNX MIDCAP	16,151	0.5 %	(15.4) %
CNX SMALLCAP	5,704	0.6 %	(28.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,883	1.7 %	11.0 %
S&P 500	2,776	1.1 %	10.7 %
FTSE 100	7,219	(0.2) %	7.2 %
HANG SENG	28,347	1.6 %	12.8 %
NIKKEI	21,282	1.8 %	8.8 %
SHANGHAI COMPOSITE	2,754	2.7 %	11.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.36	0.3 %	2.8 %
EUR/USD	1.13	0.2 %	(1.3) %
GBP/USD	1.29	0.9 %	1.3 %
USD/JPY	110.49	0.2 %	0.8 %
USD/AUD	1.40	(0.5) %	(1.2) %
USD/SGD	1.36	(0.1) %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	1.0 %	20.6 %
Gold(INR/10g)	33,371	0.5 %	5.8 %
Gold Comex(USD/oz)	1,324	0.4 %	2.6 %
SILVER(INR/1Kg)	40,144	0.9 %	4.9 %
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: China's banks made the most new loans on record in January – totalling 3.23tn yuan– as policymakers attempted to revive sluggish investment and prevent a sharper slowdown in the world's second-largest economy. The European Central Bank's Olli Rehn told a German newspaper on Sunday that recent data point to a weakening euro zone economy and interest rates would remain at the current level until monetary policy goals have been met. Japan core machine orders eased 0.1% on month in December, the Cabinet Office said on Monday, following the flat reading in November. On a yearly basis, core machine orders were up 0.9 percent, following the 0.8% increase in the previous month. Core machine orders for the fourth quarter of 2018 were down 4.2% on quarter and up 2% on year. For the first quarter of 2019, core machine orders are predicted to fall 1.8% on quarter and gain 1.5% on year. UK households' assessment of their financial well-being fell to the lowest level in eleven months in February, survey data from the IHS Markit showed on Monday. The IHS Markit Household Finance Index, or HFI, fell to 43.4 from 44.7 in January, marking the lowest reading since March 2018.

Global Equities: Investors hoped for progress at China-US trade talks while Donald Trump declared a national emergency citing a humanitarian crisis at the Southern Border. Brexit developments remain in focus for European investors.

Indian Economy: A majority of domestic banks expect liquidity to remain tight in the last quarter of this fiscal despite a slight improvement in the situation, says a survey. The liquidity scenario remained in deficit in the third quarter of 2018-19, the survey of 23 banks from public, private, foreign and small finance segments said. The banks also agreed that the RBI has taken adequate measures, by the way of open market operations (OMOs) to maintain liquidity and suggested that the central bank should continue OMO purchases for a remaining period of the fiscal year. As against 643.6 lakh hectares (lh) planted in the same week previous year, the area covered during the current rabi season stood at 617.8 lh, the Agriculture Ministry data showed on Friday. This accounted for a drop of 3.90%.

Equity Markets: Local stocks ended with steep losses amid broad based selling pressure in index pivotals. The market exhibited cautious sentiment fearing an escalation in tensions between India and Pakistan in the aftermath of the Thursday's Pulwama terror attack. The devastating terror attack last week in Pulwama district of Jammu and Kashmir took lives of at least 40 CRPF personnel.

Corporate News: HCL Technologies has been recognized as a leader in providing Next Gen Application Development and Maintenance (ADM) for the banking, financial service, and insurance (BFSI) sectors, according to 2018 ISG Providers Lens™ Quadrant Report. VBC Ferro Alloys resumed its manufacturing operations with effect from 18 February 2019 at Rudraram Village, Patancheru Mandal, Sangareddy District, Telangana State after successful trial run of production activities. Nestle India has lined up nearly two-three dozen products that it plans to launch in calendar year 2019 across categories in the country to drive its aggressive growth plans, media reports noted.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(94.7)	35.9	(29.8)
MF(INR cr)	1,488.1	426.9	429.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,850	34,607	34,313
F&O(INR cr)	549,669	841,970	961,568

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.9	15.7	16.7
NSE VIX	18.0	16.0	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,654	(0.5) %	9.6 %	Energy	14,434	(1.3) %	8.6 %
IT	15,659	(1.0) %	23.2 %	Pharma	8,574	(0.8) %	(0.5) %
Metals	2,652	(0.9) %	(25.1) %	Finance	11,148	(0.6) %	8.6 %
Auto	8,068	(0.8) %	(27.0) %	PSU	2,661	(1.2) %	(6.8) %
FMCG	28,965	(1.2) %	9.3 %	Real Estate	224	0.8 %	(24.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharti Inf	317	3.3 %	(6.1) %	Interglobe	1,106	(3.7) %	(16.7) %
Vodafone I	31	2.2 %	(60.6) %	Ambuja Cem	198	(3.3) %	(17.6) %
Britannia	2,912	1.9 %	14.0 %	L&T Fin.Ho	122	(3.0) %	(24.0) %
Zee Entert	439	1.8 %	(24.2) %	TCS	1,970	(2.9) %	35.4 %
O N G C	137	1.6 %	(23.8) %	Dabur Indi	422	(2.8) %	25.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA February Meeting Minutes (FEB)	19-02-2019	00:30	AUD	-	-
Westpac Leading Index (MoM) (JAN)	19-02-2019	23:30	AUD	-	(0.0021)
Exports (MoM) (JAN)	19-02-2019	07:00	CHF	-	(0.05)
Imports (MoM) (JAN)	19-02-2019	07:00	CHF	-	0.037
Swiss Watch Exports (YoY) (JAN)	19-02-2019	07:00	CHF	-	(0.028)
Euro-Zone Current Account s.a. (euros) (DEC)	19-02-2019	09:00	EUR	-	-
Euro-Zone Construction Output s.a. (MoM) (DEC)	19-02-2019	10:00	EUR	-	(0.001)
Euro-Zone Construction Output w.d.a. (YoY) (DEC)	19-02-2019	10:00	EUR	-	0.009
Euro-Zone ZEW Survey (Economic Sentiment) (FEB)	19-02-2019	10:00	EUR	-	(20.9)
German ZEW Survey Current Situation (FEB)	19-02-2019	10:00	EUR	-	27.6
German ZEW Survey Expectations (FEB)	19-02-2019	10:00	EUR	-	(15)
ECB Vice-President Guindos Speaks in Brussels	19-02-2019	10:15	EUR	-	-
ECB's Praet Speaks in Berlin	19-02-2019	15:00	EUR	-	-
Average Weekly Earnings (3M/YoY) (DEC)	19-02-2019	09:30	GBP	-	0.034
Claimant Count Rate (JAN)	19-02-2019	09:30	GBP	-	0.028
Employment Change 3M/3M (DEC)	19-02-2019	09:30	GBP	-	-
ILO Unemployment Rate 3Mths (DEC)	19-02-2019	09:30	GBP	-	0.04
Jobless Claims Change (JAN)	19-02-2019	09:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (DEC)	19-02-2019	09:30	GBP	-	0.033
Tokyo Condominium Sales (YoY) (JAN)	19-02-2019	04:00	JPY	-	0.152
Adjusted Merchandise Trade Balance (Yen) (JAN)	19-02-2019	23:50	JPY	-	-
Exports (YoY) (JAN)	19-02-2019	23:50	JPY	-	(0.038)
Imports (YoY) (JAN)	19-02-2019	23:50	JPY	-	0.019
Trade Balance (JAN)	19-02-2019	23:50	JPY	-	-
Non Resident Bond Holdings (JAN)	19-02-2019	02:00	NZD	-	0.546
Producer Price Index Input (QoQ) (4Q)	19-02-2019	21:45	NZD	-	0.014
Producer Price Index Output (QoQ) (4Q)	19-02-2019	21:45	NZD	-	0.015
Fed's Mester Speaks on Economic Outlook and Monetary Policy	19-02-2019	13:50	USD	-	-
NAB's Hume Speaks on Economic Outlook (FEB)	19-02-2019	15:00	USD	-	50



U.S. to Sell USD39 Bln 6-Month Bills	19-02-2019	16:30	USD	-	-
U.S. to Sell USD45 Bln 3-Month Bills	19-02-2019	16:30	USD	-	-

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