



20 Feb.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,655	0.5 %	4.3 %
BSE SENSEX	35,353	(0.4) %	6.9 %
CNX BANK	26,786	0.4 %	10.1 %
CNX MIDCAP	16,211	0.5 %	(15.1) %
CNX SMALLCAP	5,705	0.3 %	(28.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,891	0.0 %	11.0 %
S&P 500	2,780	0.2 %	10.9 %
FTSE 100	7,179	(0.6) %	6.6 %
HANG SENG	28,228	(0.4) %	12.3 %
NIKKEI	21,303	0.1 %	8.9 %
SHANGHAI COMPOSITE	2,756	0.1 %	11.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.36	0.2 %	2.8 %
EUR/USD	1.14	0.5 %	(0.8) %
GBP/USD	1.31	1.4 %	2.6 %
USD/JPY	110.82	0.3 %	1.1 %
USD/AUD	1.39	(0.4) %	(1.9) %
USD/SGD	1.35	(0.4) %	(1.0) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(0.4) %	20.5 %
Gold(INR/10g)	33,519	0.4 %	6.3 %
Gold Comex(USD/oz)	1,342	1.4 %	4.0 %
SILVER(INR/1Kg)	40,220	0.2 %	5.1 %
Aluminium(USD/MT)	1,834	0.6 %	(1.3) %
Copper(USD/MT)	6,247	(0.4) %	7.0 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	(0.0) %	0.0 %

**Global Economy:** The WTO's quarterly outlook indicator, a composite of seven drivers of trade, showed a reading of 96.3, the weakest since March 2010 and down from 98.6 in November. A reading below 100 signals below-trend growth in trade. This sustained loss of momentum highlights the urgency of reducing trade tensions, which together with continued political risks and financial volatility could foreshadow a broader economic downturn, the WTO said in a statement. World economic growth is likely to be around 3.75% in real terms in calendar year 2018, similar to calendar year 2017. In 2018, stronger outcomes for the US and India have offset slower growth in China, Europe and Japan, the global mining major BHP stated. Germany's investor confidence improved further to its highest level in five months in February, survey data from the ZEW Centre for European Economic Research showed. The ZEW Indicator of Economic Sentiment for Germany rose to -13.4 points from -15.0 points in January. The latest reading marked the highest since September, when the score was -10.6. The current conditions index fell sharply to 15 from 27.6. UK employment rose by 167,000 to a record high of 32.60 million in the three months to December, figures from the Office for National Statistics showed. The employment rate remained at 75.8%, which was the highest since comparable records began in 1971. The number of unemployed fell by 14,000 to 1.36 million from the July to September period. The ILO jobless rate was unchanged at 4% in the three months to December, which was the lowest since December 1974 to February 1975 period.

**Global Equities:** Sentiments turned choppy after recent gains as Investors focus on new round of talks between the US and China. European stocks eased on weak earnings updates.

**Indian Economy:** India's economy is on a healthy medium-term growth trajectory, notwithstanding the typical emerging market difficulties it experienced in calendar 2018, noted the global mining major BHP stated today in its latest earnings update and outlook. Reform signposts have been positive, in general, underscoring the nation's long run potential. The government has allocated Rs 132 crore to the Directorate General of Foreign Trade (DGFT) to revamp IT infrastructure for upgradation of logistics in a bid to provide paperless, faceless and transparent solutions to the problems faced by industry and trade in the movement of goods and services across the country.

**Equity Markets:** Domestic stocks erased intraday gains to settle with modest losses in a volatile session of trade. Broader market outperformed the main stock indices. The Nifty reversed gains after touching 10,700 mark in mid-afternoon trade. The barometer index, the S&P BSE Sensex, fell 145.83 points or 0.41% to settle at 35,352.61. The Nifty 50 index fell 36.60 points or 0.34% to settle at 10,604.35. Among secondary barometers, the BSE Mid-Cap index rose 0.51%. The BSE Small-Cap index rose 0.33%.

**Corporate News:** ABB India has won its largest traction equipment order in India, worth more than Rs 270 crore to supply state-of-the-art converters for electric locomotives from Diesel Locomotive Works (DLW), in Varanasi. Nucleus Software Exports has won award for 'Best Cloud Lending Solution' at the BFSI Innovative Technology Awards 2018 for FinnOne Neo Cloud. In addition to this, the company also won the "Best Lending Technology Implementation of the Year".



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	0.0	(1.3)	(31.3)
MF(INR cr)	1,488.1	426.9	429.8

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,803	34,084	34,284
F&O(INR cr)	868,444	844,007	961,147

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.9	15.6	16.7
NSE VIX	18.5	16.1	15.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,685	0.1 %	9.7 %	Energy	14,411	(0.2) %	8.4 %
IT	15,334	(2.1) %	20.7 %	Pharma	8,553	(0.2) %	(0.8) %
Metals	2,690	1.4 %	(24.0) %	Finance	11,158	0.1 %	8.7 %
Auto	8,073	0.1 %	(27.0) %	PSU	2,696	1.3 %	(5.5) %
FMCG	29,010	0.2 %	9.5 %	Real Estate	228	1.7 %	(23.0) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
DLF	163	4.7 %	(18.7) %	TCS	1,905	(3.3) %	30.9 %
SAIL	46	3.9 %	(36.8) %	Wipro	363	(3.2) %	25.5 %
Vedanta	153	3.4 %	(45.8) %	NTPC	134	(2.7) %	(21.5) %
Bank of Ba	102	3.3 %	(27.8) %	IndusInd B	1,481	(2.4) %	(18.0) %
Grasim Ind	718	2.6 %	(34.1) %	Infosys	724	(2.3) %	27.4 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (JAN)	20-02-2019	00:00	AUD	-	0.007
Wage Price Index (QoQ) (4Q)	20-02-2019	00:30	AUD	-	0.006
Wage Price Index (YoY) (4Q)	20-02-2019	00:30	AUD	-	0.023
CBA Australia PMI Composite (FEB P)	20-02-2019	22:00	AUD	-	51.3
CBA Australia PMI Mfg (FEB P)	20-02-2019	22:00	AUD	-	53.9
CBA Australia PMI Services (FEB P)	20-02-2019	22:00	AUD	-	51
ECB's Praet Speaks in Frankfurt	20-02-2019	07:00	EUR	-	-
German Producer Price Index (MoM) (JAN)	20-02-2019	07:00	EUR	-	(0.004)
German Producer Price Index (YoY) (JAN)	20-02-2019	07:00	EUR	-	0.027
Euro-Zone Consumer Confidence (FEB A)	20-02-2019	15:00	EUR	-	(7.9)
Convenience Store Sales (YoY) (JAN)	20-02-2019	07:00	JPY	-	0.012
Foreign Buying Japan Bonds (FEB 15)	20-02-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (FEB 15)	20-02-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (FEB 15)	20-02-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (FEB 15)	20-02-2019	23:50	JPY	-	-
MBA Mortgage Applications (FEB 15)	20-02-2019	12:00	USD	-	(0.037)
U.S. to Sell USD18 Bln 2-Year Floating Rate Notes Reopening	20-02-2019	16:30	USD	-	-
Fed's Kaplan to Speak in Q&A in Houston, Texas	20-02-2019	18:10	USD	-	-
FOMC Meeting Minutes (JAN)	20-02-2019	19:00	USD	-	-

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