



21 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,907	0.0 %	6.8 %
BSE SENSEX	36,387	0.0 %	9.4 %
CNX BANK	27,457	(0.3) %	12.9 %
CNX MIDCAP	17,517	(0.7) %	(8.3) %
CNX SMALLCAP	6,371	(1.1) %	(19.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,706	1.4 %	5.9 %
S&P 500	2,671	1.3 %	6.5 %
FTSE 100	6,968	2.0 %	3.5 %
HANG SENG	27,091	1.3 %	7.8 %
NIKKEI	20,666	1.3 %	5.6 %
SHANGHAI COMPOSITE	2,596	1.4 %	5.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.19	0.2 %	2.5 %
EUR/USD	1.14	(0.3) %	(0.8) %
GBP/USD	1.29	(0.9) %	1.0 %
USD/JPY	109.77	0.4 %	0.1 %
USD/AUD	1.40	0.4 %	(1.8) %
USD/SGD	1.36	0.2 %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	1.9 %	14.1 %
Gold(INR/10g)	32,276	(0.4) %	2.4 %
Gold Comex(USD/oz)	1,281	(0.8) %	(0.7) %
SILVER(INR/1Kg)	39,034	(0.5) %	2.0 %
Aluminium(USD/MT)	1,851	2.6 %	(0.4) %
Copper(USD/MT)	6,022	1.5 %	3.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.2 %

Global Economy: The consumer sentiment index in the US plummeted to 90.7 in January from the final December reading of 98.3. Following this tumble, the consumer sentiment index tested its lowest level since hitting 87.2 in October of 2016. The US Fed said industrial production rose by 0.3% in December after gaining by a downwardly revised 0.4% in November. The in production came as manufacturing output surged up by 1.1% in December after inching up by 0.1% in November, recording its biggest spike since last February. Eurozone house prices climbed 4.3% year-on-year in the third quarter, following a 4.4% rise in the previous three months. UK retail sales decreased in December at the fastest pace in over one-and-a-half years, suggesting that households have started to rein in their spending ahead of Brexit. The seasonally adjusted retail sales including auto fuel contracted 0.9% from November, when they grew 1.3 % driven by Black Friday sales. The consumer prices in Japan were up 0.3% on year in December, the Ministry of Internal Affairs and Communications said. That was down from 0.8% in November.

Global Equities: US markets witnessed a four-day winning streak as traders continued to express optimism about trade talks between the US and China.

Indian Equities: The foreign tourist arrivals (FTAs) to India increased 2% to 11,91,147 in December 2018 as compared to 11,67,840 in December 2017. The growth of FTAs have improved to three-month high in December 2018, but moderated sharply from 14.4% in December 2017. The overall FTAs rose at three-year low pace of 5.2% to 105.59 lakh in January-December 2018 as compared to 100.36 lakh in January-December 2017. The water storage available in 91 major reservoirs of the country for the week ending on 17 January 2019 was 77.171 billion cubic meters (BCM), which is 48% of total storage capacity of these reservoirs. This percentage was at 50% for the week ending on 10 January 2019. India's foreign exchange reserves increases by US\$ 1.27 billion to US\$ 397.35 billion in the week ended 11 January 2019. The foreign exchange reserves had stood at US\$ 396.08 a week ago.

Equity Markets: Local stocks eked out small gains on last trading day of the week. The barometer index, the S&P BSE Sensex, rose 12.53 points or 0.03% to settle at 36,386.61. The index hit high of 36,469.98 and low of 36,218.33 in intraday trade. The Nifty 50 index rose 1.75 points or 0.02% to settle at 10,906.95. The index hit high of 10,928.20 and low of 10,852.20 in intraday trade. The S&P BSE Mid-Cap index fell 0.79%. The S&P BSE Small-Cap index fell 0.73%.

Corporate News: Local Oil Marketing Companies could see some selling pressure following the spurt in oil. The WTI Crude oil futures soared as supportive US equities capped the downside and the counter ended around 53.70 per barrel – its five week high. Local IT counters could see some buying as the Indian Rupee stayed weak, extending its recent losses. On Friday, the local currency weakened by 16 paise to close at 71.19 against the US dollar amid rise in demand for the greenback from exporters and a massive spurt in global crude oil prices. Confederation of Industry (CII) suggested policy measures required to ease the tight liquidity situation by effecting a cut in CRR rate of at least 50 basis points, measures to facilitate flow of credit to industry especially to MSMEs and Infrastructure sector and address the high cost of credit by considering reduction in repo rate of 50 basis points given that inflation has been consistently low.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	125.0	(21.8)	(35.7)
MF(INR cr)	(379.6)	363.0	439.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	30,946	28,722	34,214
F&O(INR cr)	513,332	925,402	966,393

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.8	20.2	16.7
NSE VIX	16.6	16.0	15.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,457	(0.3) %	12.9 %	Energy	14,608	2.5 %	9.9 %
IT	14,893	0.6 %	17.2 %	Pharma	8,690	(2.7) %	0.8 %
Metals	2,957	(0.2) %	(16.5) %	Finance	11,678	(0.2) %	13.8 %
Auto	8,845	(0.4) %	(20.0) %	PSU	3,084	(1.2) %	8.0 %
FMCG	30,540	(0.6) %	15.2 %	Real Estate	238	(1.3) %	(19.6) %

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>
Reliance I	1,184	4.4 %	32.6 %	Sun Pharma	391	(8.4) %	(23.1) %
Wipro	346	3.2 %	19.5 %	Sun TV Net	525	(7.0) %	(38.9) %
Kotak Mah.	1,240	1.7 %	13.1 %	Bharti Air	311	(6.3) %	(21.2) %
Hindalco I	209	1.4 %	(1.2) %	Vodafone I	35	(4.7) %	(54.8) %
Adani Port	399	1.2 %	8.0 %	Piramal En	2,296	(3.8) %	(7.1) %

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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