



21 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,736	0.0 %	5.1 %
BSE SENSEX	35,756	1.1 %	7.5 %
CNX BANK	27,028	0.3 %	11.1 %
CNX MIDCAP	16,375	0.5 %	(14.3) %
CNX SMALLCAP	5,770	0.4 %	(27.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,954	0.2 %	11.3 %
S&P 500	2,785	0.2 %	11.1 %
FTSE 100	7,229	0.7 %	7.3 %
HANG SENG	28,514	1.0 %	13.5 %
NIKKEI	21,431	0.6 %	9.6 %
SHANGHAI COMPOSITE	2,761	0.2 %	12.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.12	(0.3) %	2.4 %
EUR/USD	1.13	0.3 %	(1.0) %
GBP/USD	1.30	1.0 %	2.2 %
USD/JPY	110.73	0.2 %	1.0 %
USD/AUD	1.40	(0.4) %	(1.6) %
USD/SGD	1.35	(0.4) %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.9 %	22.9 %
Gold(INR/10g)	33,730	0.6 %	7.0 %
Gold Comex(USD/oz)	1,339	(0.3) %	3.7 %
SILVER(INR/1Kg)	40,596	0.9 %	6.1 %
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	0.6	(2.0) %	(2.0) %

Global Economy: The US Fed meeting minutes confirmed a dovish stance as the Federal Reserve officials discussed at their meeting three weeks ago ending the reduction of bonds on the central bank's balance sheet before the end of 2019. PwC has released a report where the company previewed the World in 2050 and what the largest economies will be in the next 31 years. According to the report, the cumulative global GDP growth between 2016 and 2050 will be 130% while The projected share of China of the world's GDP at PPPs by 2050 will be 20%. The report also noted that India will have a second place GDP ranking at PPPs by 2050. This puts India just behind China but ahead of the United States who are third in the ranking. Germany's producer price inflation eased for a second straight month to its lowest level in eight months in January, figures from the Federal Statistical Office showed on Wednesday. The producer price index rose 2.6% year-on-year in January, following a 2.7% in December. Japan had a merchandise trade deficit of 1,452.2 billion yen in January, following the 56.7 billion yen deficit in December. Exports were down 8.4% on year to 5.574 trillion yen after dropping 4% in the previous month. Imports eased an annual 0.6% to 6.989 trillion yen after rising 2% in previous month. Australia wage prices were up a seasonally adjusted 0.5% on quarter in the fourth quarter of 2018, the Australian Bureau of Statistics said on Wednesday, as against an increase of 0.6% in the previous quarter. On a yearly basis, wage prices rose 2.3%.

Global Equities: Sentiments were supported on signs that US-China trade relations could be improving. NY Fed President John Williams has noted that he is comfortable with the level US interest rates are at now.

Indian Economy: The air passenger traffic of domestic airlines has increased at slow pace of 9.1% to 125.08 lakh in January 2019 over 114.65 lakh in January 2018. Indigo has posted strong 16.8% growth in the passenger traffic to 53.22 lakh, while gained share to 42.5% in January 2019. Spice Jet also posted strong 15.1% growth in the passenger traffic to 16.66 lakh, followed by Air India 0.1% to 15.30 lakh and Air Asia 36.4% to 6.67 lakh. In the current October-September sugar season (SS) 2018-19, 507 sugar mills have produced 219.30 lakh tonnes of sugar as on 15 February 2019, as compared to 203.55 lakh tonnes produced by 494 mills on the corresponding date last year, indicating at a growth of 7.4%. Higher production this year is mainly because Maharashtra and Karnataka sugar mills started their crushing earlier this year. Overall, the country is expected to produce less sugar this season as compared to last season.

Equity Markets: Local stocks saw a strong surge after latest spell of volatility. Hares of index heavyweights, Reliance Industries, Infosys and HDFC Bank edged higher. The market breadth, indicating the overall health of the market, was positive. Both Nifty and Sensex jumped more than 1%.

Corporate News: Tata Consultancy Services has been recognised as a Global Top Employer for the fourth consecutive year by the Top Employers Institute, and is the only company among the top 10 IT services brands to receive the certification. HCL Technologies has won a five year IT infrastructure and application services contract with EDF Luminus, the second largest electricity producer and energy supplier in the Belgian energy market. Bharat Heavy Electricals announced that CARE has rated its Commercial Paper (Rs 4000 crore) at CARE A1+. The rating agency also reaffirmed the ratings for the company long term fund based bank facilities (Rs 6000 crore) at CARE AA+/Stable and long / short term non fund based bank facilities (Rs 54000 crore) at CARE AA+/Stable/CARE A1+.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(218.1)	(18.0)	(32.1)
MF(INR cr)	425.8	432.6	430.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,840	33,709	34,259
F&O(INR cr)	1,011,506	855,971	961,374

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.0	15.5	16.7
NSE VIX	17.1	16.2	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,956	1.0 %	10.8 %	Energy	14,679	1.9 %	10.4 %
IT	15,609	1.8 %	22.8 %	Pharma	8,606	0.6 %	(0.2) %
Metals	2,765	2.8 %	(21.9) %	Finance	11,288	1.2 %	10.0 %
Auto	8,122	0.6 %	(26.6) %	PSU	2,743	1.7 %	(3.9) %
FMCG	29,053	0.2 %	9.6 %	Real Estate	229	0.3 %	(22.8) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	645	5.0 %	(48.1) %	Petronet L	212	(1.3) %	(8.2) %
Shriram Tr	1,051	5.0 %	(28.4) %	ICICI Lomb	906	(1.2) %	15.6 %
Vedanta	160	4.7 %	(43.2) %	Hero Motoc	2,624	(0.5) %	(28.0) %
Adani Port	355	4.5 %	(4.0) %	Marico	333	(0.5) %	1.4 %
Tata Steel	491	4.3 %	(15.1) %	Bajaj Auto	2,775	(0.5) %	(1.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (JAN)	21-02-2019	00:30	AUD	-	-
Full Time Employment Change (JAN)	21-02-2019	00:30	AUD	-	-
Part Time Employment Change (JAN)	21-02-2019	00:30	AUD	-	-
Participation Rate (JAN)	21-02-2019	00:30	AUD	-	0.656
RBA Foreign Exchange Transaction (Australian dollar) (JAN)	21-02-2019	00:30	AUD	-	-
RBA FX Transactions Government (JAN)	21-02-2019	00:30	AUD	-	-
RBA FX Transactions Other (JAN)	21-02-2019	00:30	AUD	-	-
Unemployment Rate (JAN)	21-02-2019	00:30	AUD	-	0.05
RBA's Lowe Parliamentary Testimony	21-02-2019	22:30	AUD	-	-
Wholesale Trade Sales (MoM) (DEC)	21-02-2019	13:30	CAD	-	(0.01)
Bank of Canada Governor Stephen Poloz Speech	21-02-2019	17:35	CAD	-	-
Money Supply M3 (YoY) (JAN)	21-02-2019	08:00	CHF	-	0.031
German Consumer Price Index (MoM) (JAN F)	21-02-2019	07:00	EUR	-	(0.008)
German Consumer Price Index (YoY) (JAN F)	21-02-2019	07:00	EUR	-	0.014
ECB's Praet Speaks in Luxembourg	21-02-2019	08:00	EUR	-	-
Markit France Composite PMI (FEB P)	21-02-2019	08:15	EUR	-	48.2
Markit France Manufacturing PMI (FEB P)	21-02-2019	08:15	EUR	-	51.2
Markit France Services PMI (FEB P)	21-02-2019	08:15	EUR	-	47.8
Markit Germany Services PMI (FEB P)	21-02-2019	08:30	EUR	-	53
Markit/BME Germany Composite PMI (FEB P)	21-02-2019	08:30	EUR	-	52.1
Markit/BME Germany Manufacturing PMI (FEB P)	21-02-2019	08:30	EUR	-	49.7
Markit Eurozone Composite PMI (FEB P)	21-02-2019	09:00	EUR	-	51
Markit Eurozone Manufacturing PMI (FEB P)	21-02-2019	09:00	EUR	-	50.5
Markit Eurozone Services PMI (FEB P)	21-02-2019	09:00	EUR	-	51.2
Publication of the financial statements of the ECB for 2018	21-02-2019	09:00	EUR	-	-
ECB Accounts of the Governing Council's January Meeting (JAN)	21-02-2019	12:30	EUR	-	-
ECB's Praet Speaks in Brussels	21-02-2019	13:30	EUR	-	-
Central Government NCR (JAN)	21-02-2019	09:30	GBP	-	-
ECB's Praet Speaks in Brussels (JAN)	21-02-2019	09:30	EUR	-	-



Public Finances (PSNCR) (Pounds) (JAN)	21-02-2019	09:30	GBP	-	-
Public Sector Net Borrowing (JAN)	21-02-2019	09:30	GBP	-	-
Nikkei Japan PMI Manufacturing (FEB P)	21-02-2019	00:30	JPY	-	50.3
All Industry Activity Index (MoM) (DEC)	21-02-2019	04:30	JPY	-	(0.003)
Nationwide Department Store Sales (YoY) (JAN)	21-02-2019	05:30	JPY	-	(0.007)
Machine Tool Orders (YoY) (JAN F)	21-02-2019	06:00	JPY	-	(0.188)
National Consumer Price Index (YoY) (JAN)	21-02-2019	23:30	JPY	-	0.003
National Consumer Price Index Ex-Fresh Food (YoY) (JAN)	21-02-2019	23:30	JPY	-	0.007
Natl CPI Ex Fresh Food, Energy (YoY) (JAN)	21-02-2019	23:30	JPY	-	0.003
Fed's Bostic Speaks on Economy and Monetary Policy	21-02-2019	12:50	USD	-	-
Cap Goods Orders Nondef Ex Air (DEC P)	21-02-2019	13:30	USD	-	(0.006)
Cap Goods Ship Nondef Ex Air (DEC P)	21-02-2019	13:30	USD	-	(0.002)
Continuing Claims (FEB 09)	21-02-2019	13:30	USD	-	-
Durable Goods Orders (DEC P)	21-02-2019	13:30	USD	-	0.007
Durables Ex Transportation (DEC P)	21-02-2019	13:30	USD	-	(0.004)
Initial Jobless Claims (FEB 16)	21-02-2019	13:30	USD	-	-
Philadelphia Fed Business Outlook (FEB)	21-02-2019	13:30	USD	-	17
Markit US Composite PMI (FEB P)	21-02-2019	14:45	USD	-	54.4
Markit US Manufacturing PMI (FEB P)	21-02-2019	14:45	USD	-	54.9
Markit US Services PMI (FEB P)	21-02-2019	14:45	USD	-	54.2
Existing Home Sales (JAN)	21-02-2019	15:00	USD	-	-
Existing Home Sales (MoM) (JAN)	21-02-2019	15:00	USD	-	(0.064)
Leading Index (JAN)	21-02-2019	15:00	USD	-	(0.001)
EIA Working Natural Gas Implied Flow (FEB 15)	21-02-2019	15:30	USD	-	(78)
DOE Cushing OK Crude Inventory (FEB 15)	21-02-2019	16:00	USD	-	-
DOE U.S. Crude Oil Inventories (FEB 15)	21-02-2019	16:00	USD	-	-
DOE U.S. Distillate Inventory (FEB 15)	21-02-2019	16:00	USD	-	-
DOE U.S. Gasoline Inventories (FEB 15)	21-02-2019	16:00	USD	-	-
U.S. to Sell 4-Week Bills	21-02-2019	16:30	USD	-	-
U.S. to Sell 8-Week Bills	21-02-2019	16:30	USD	-	-
U.S. to Sell USD8 Bln 30-Year TIPS	21-02-2019	18:00	USD	-	-

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