



22 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,940	(0.2) %	7.1 %
BSE SENSEX	36,579	0.5 %	9.8 %
CNX BANK	27,467	(0.2) %	12.9 %
CNX MIDCAP	17,339	(0.2) %	(9.2) %
CNX SMALLCAP	6,304	(0.1) %	(20.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,706	1.4 %	5.9 %
S&P 500	2,671	1.3 %	6.5 %
FTSE 100	6,962	0.0 %	3.4 %
HANG SENG	27,197	0.4 %	8.2 %
NIKKEI	20,719	0.3 %	5.9 %
SHANGHAI COMPOSITE	2,611	0.6 %	5.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.28	0.3 %	2.7 %
EUR/USD	1.14	(0.2) %	(0.7) %
GBP/USD	1.29	(0.7) %	1.1 %
USD/JPY	109.62	0.3 %	0.0 %
USD/AUD	1.40	0.6 %	(1.6) %
USD/SGD	1.36	0.2 %	(0.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	1.6 %	15.9 %
Gold(INR/10g)	32,154	(0.4) %	2.0 %
Gold Comex(USD/oz)	1,278	(0.3) %	(1.0) %
SILVER(INR/1Kg)	38,601	(1.1) %	0.9 %
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) %	0.1 %

Global Economy: China stated that its official economic growth came in at 6.6% in 2018 – the slowest pace since 1990. The Fourth quarter GDP growth came in at 6.4%, declining from 6.5% year-over-year growth in the third quarter. China's industrial output growth marked an increase of 6.2% year on year in 2018, slowing from 6.6% growth in 2017, the National Bureau of Statistics (NBS) said Monday. Value-added industrial output in China rose 5.7% in December from a year earlier, accelerating from a 5.4% year on year increase in November, the National Bureau of Statistics stated. The urban fixed-asset investment in China's urban areas rose 5.9% in 2018 from a year earlier. Retail sales rose 8.2% in December from a year earlier, following November's 8.1% increase. A measure reflecting UK households' perceptions regarding their finances in the coming 12 months remained subdued and they continue expect further deterioration in finances this year, survey data from IHS Markit showed. The IHS Markit UK household finance index rose to a three-month high of 44.8 in January from 44 in December. However, the reading remained below the 50-mark.

Global Equities: Investors eyed media reports suggesting that China had offered to buy more American goods through 2024 to eliminate its trade imbalance with the US. US markets were closed Monday in honor of Martin Luther King Jr. Day.

Indian Economy: India's 119 billionaires saw their wealth rising, on an average, by Rs 2,200 crore a day in 2018, according to an annual report 'Public Good or Private Wealth' by Oxfam, an international charity organisation. The Gini wealth coefficient in India has gone up from 81.2% in 2008 to 85.4% in 2018, which shows inequality has risen sharply over last decade. The Indian Sugar Mills Association (ISMA), stated that the sugar production in the current season is estimated to be around 307 lac tons, against the first advance estimates of 315 lac tons released by ISMA in October 2018. Development of rural areas should not erode their unique identities but must fortify their spirits, the Vice President of India Venkaiah Naidu said.

Equity Markets: Key equity indices settled with modest gains led by index pivotals. The market breadth, indicating the overall health of the market, was weak. Global cues were mixed. The barometer index, the S&P BSE Sensex, rose 192.35 points or 0.53% to settle at 36,578.96. The Nifty 50 index rose 54.90 points or 0.50% to settle at 10,961.85. Among secondary barometers, the BSE Mid-Cap index fell 0.56%. The BSE Small-Cap index fell 0.70%.

Corporate News: Asian Paints and TVS Motor Company will announce October-December 2018 quarterly results on Tuesday, 22 January 2019. HDFC Asset Management Company's net profit rose 24.71% to Rs 243.26 crore on 7.61% rise in total income to Rs 532.94 crore in Q3 December 2018 over Q3 December 2017. Just Dial's net profit rose 100.49% to Rs 57.34 crore on 30.84% rise in total income to Rs 260.86 crore in Q3 December 2018 over Q3 December 2017. Canara Bank said it has floated Request for Quotes (RFQ) by inviting bids in order to offload equity shares of NSDL, NeGIL and SIDBI through bidding process. JTL Infra announced that as part of the company's geographically diversified manufacturing location expansion plans and in order to meet the growing demand of Company's products in domestic as well as in international market, trial production started at the Company's new Greenfield state of the art manufacturing plant at Mangoan, Raigad, Maharashtra.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(271.1)	(39.6)	(36.9)
MF(INR cr)	364.2	349.4	437.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,548	28,910	34,200
F&O(INR cr)	547,131	900,184	964,296

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.8	20.2	16.7
NSE VIX	18.2	16.1	15.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,534	0.3 %	13.2 %	Energy	14,964	2.4 %	12.6 %
IT	14,966	0.5 %	17.8 %	Pharma	8,735	0.5 %	1.3 %
Metals	2,946	(0.4) %	(16.8) %	Finance	11,717	0.3 %	14.2 %
Auto	8,747	(1.1) %	(20.9) %	PSU	3,043	(1.3) %	6.6 %
FMCG	30,485	(0.2) %	15.0 %	Real Estate	235	(1.4) %	(20.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Reliance I	1,238	4.5 %	38.6 %	Vodafone I	33	(6.7) %	(57.8) %
Motherson	163	3.4 %	(24.4) %	Hero Motoc	2,794	(3.6) %	(23.4) %
Kotak Mah.	1,268	2.2 %	15.6 %	Yes Bank	192	(3.3) %	(37.3) %
Bajaj Fins	6,385	2.2 %	21.2 %	Bandhan Ba	427	(3.1) %	(10.3) %
Bajaj Fin.	2,594	2.0 %	42.6 %	Container	665	(2.8) %	7.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Leading Index (MoM) (DEC)	22-01-2019	23:30	AUD	-	(0.0009)
Manufacturing Sales (MoM) (NOV)	22-01-2019	13:30	CAD	-	(0.001)
Wholesale Trade Sales (MoM) (NOV)	22-01-2019	13:30	CAD	-	0.01
Euro-Zone ZEW Survey (Economic Sentiment) (JAN)	22-01-2019	10:00	EUR	-	(21)
German ZEW Survey Current Situation (JAN)	22-01-2019	10:00	EUR	-	45.3
German ZEW Survey Expectations (JAN)	22-01-2019	10:00	EUR	-	(17.5)
Average Weekly Earnings (3M/YoY) (NOV)	22-01-2019	9:30	GBP	-	0.033
Central Government NCR (DEC)	22-01-2019	9:30	GBP	-	-
Claimant Count Rate (DEC)	22-01-2019	9:30	GBP	-	0.028
Employment Change 3M/3M (NOV)	22-01-2019	9:30	GBP	-	-
ILO Unemployment Rate 3Mths (NOV)	22-01-2019	9:30	GBP	-	0.041
Jobless Claims Change (DEC)	22-01-2019	9:30	GBP	-	-
PSNB ex Banking Groups (DEC)	22-01-2019	9:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (DEC)	22-01-2019	9:30	GBP	-	-
Public Sector Net Borrowing (DEC)	22-01-2019	9:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (NOV)	22-01-2019	9:30	GBP	-	0.033
Adjusted Merchandise Trade Balance (Yen) (DEC)	22-01-2019	23:50	JPY	-	-
Exports (YoY) (DEC)	22-01-2019	23:50	JPY	-	0.001
Imports (YoY) (DEC)	22-01-2019	23:50	JPY	-	0.125
Trade Balance (DEC)	22-01-2019	23:50	JPY	-	-
Tokyo Condominium Sales (YoY) (DEC)	22-01-2019	4:00	JPY	-	0.028
Supermarket Sales (YoY) (DEC)	22-01-2019	5:00	JPY	-	(0.025)
Consumer Price Index (QoQ) (4Q)	22-01-2019	21:45	NZD	-	0.009
Consumer Price Index (YoY) (4Q)	22-01-2019	21:45	NZD	-	0.019
Existing Home Sales (DEC)	22-01-2019	15:00	USD	-	-
Existing Home Sales (MoM) (DEC)	22-01-2019	15:00	USD	-	0.019
U.S. to Sell USD39 Bln 6-Month Bills	22-01-2019	16:30	USD	-	-
U.S. to Sell USD42 Bln 3-Month Bills	22-01-2019	16:30	USD	-	-



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