



23 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,929	0.1 %	7.0 %
BSE SENSEX	36,445	(0.4) %	9.7 %
CNX BANK	27,482	0.0 %	13.0 %
CNX MIDCAP	17,359	0.0 %	(9.1) %
CNX SMALLCAP	6,299	0.0 %	(20.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,404	(1.2) %	4.6 %
S&P 500	2,633	(1.4) %	5.0 %
FTSE 100	6,901	(1.0) %	2.5 %
HANG SENG	27,005	(0.7) %	7.5 %
NIKKEI	20,623	(0.5) %	5.4 %
SHANGHAI COMPOSITE	2,580	(1.2) %	4.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.44	0.4 %	2.9 %
EUR/USD	1.14	0.0 %	(0.8) %
GBP/USD	1.30	0.6 %	1.6 %
USD/JPY	109.65	(0.1) %	0.0 %
USD/AUD	1.40	0.5 %	(1.3) %
USD/SGD	1.36	0.1 %	(0.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(2.5) %	13.0 %
Gold(INR/10g)	32,324	0.5 %	2.5 %
Gold Comex(USD/oz)	1,285	0.5 %	(0.5) %
SILVER(INR/1Kg)	38,782	0.5 %	1.4 %
Aluminium(USD/MT)	1,842	(0.5) %	(0.9) %
Copper(USD/MT)	5,952	(1.2) %	1.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	(0.0) %	0.1 %

Global Economy: The National Association of Realtors or NAR said the US existing home sales plummeted by 6.4% to an annual rate of 4.99 million in December after edging up by 2.1% to a revised rate of 5.33 million in November. With the much bigger than expected decrease, existing home sales tumbled to their lowest level since November of 2015. Germany's investor confidence improved further at the start of the year to its highest level in four months, survey data from the ZEW - Leibniz Centre for European Economic Research showed on Tuesday. The ZEW Indicator of Economic Sentiment for Germany rose to -15.0 points from -17.5 in December. UK budget deficit for December exceeded economists' expectations and was the second lowest figure for the month in 18 years, figures from the Office for National Statistics showed Tuesday. The public sector net borrowing, or PSNB, was GBP 3 billion in December, which was GBP 0.3 billion more than a year ago. UK employment hit a record high in December and the workers' pay grew at the fastest pace in a decade amid steady unemployment. The employment level grew by 141,000 sequentially to a record high 32.54 million in the three months to November. United Nations stated in a latest update that the global growth is expected to remain at 3% in 2019 and 2020. However, the steady pace of expansion in the global economy masks an increase in downside risks that could potentially exacerbate development challenges in many parts of the world, according to the World Economic Situation and Prospects 2019. The global economy is facing a confluence of risks, which could severely disrupt economic activity and inflict significant damage on longer-term development prospects.

Global Equities: Global stocks fell amid concerns on slowing global growth after IMF slashed its world economic forecast. The US stocks saw a steep sell-off and the major averages pulled back after ending last Friday's trading at their best closing levels in well over a month. DOW crashed 1.2% and the NASDAQ tumbled nearly 2%.

Equity Markets: Local stocks settled with modest losses as investors booked profits after a five-day rally. The barometer index, the S&P BSE Sensex, fell 134.32 points or 0.37% to settle at 36,444.64. The Nifty 50 index fell 39.10 points or 0.36% to settle at 10,922.75. The Nifty regained 10,900 mark after slipping below that level in intraday trade. Metal and auto shares witnessed major selling pressure.

Domestic: India's GDP is forecast to expand 7.5% in FY20 and 7.7% in FY21, as per the International Monetary Fund's (IMF) World Economic Outlook Update released by chief economist Gita Gopinath. India will continue to be the world's fastest growing major economy, the report said. India's economy is poised to pick up in 2019, benefiting from lower oil prices and a slower pace of monetary tightening than previously expected, as inflation pressures ease, it added. The update projects global growth at 3.5 per cent in 2019, a downward revision of 0.2% from the October report, and 3.6% in 2020, a reduction of 0.1%.

Corporate News: ITC and InterGlobe Aviation will announce their October-December 2018 quarterly results today, 23 January 2019. ICICI Prudential Life Insurance Company's net profit dropped 34.36% to Rs 296.77 crore on 35.26% fall in total income to Rs 8786.70 crore in Q3 December 2018 over Q3 December 2017. HDFC Standard Life Insurance Company's net profit rose 18.48% to Rs 245.63 crore on 3.69% fall in total income to Rs 9386.57 crore in Q3 December 2018 over Q3 December 2017. Oberoi Realty's consolidated net profit rose 14.76% to Rs 137.93 crore on 52.79% rise in total income to Rs 552.03 crore in Q3 December 2018 over Q3 December 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	119.1	(29.0)	(36.2)
MF(INR cr)	485.9	357.8	438.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,580	29,264	34,202
F&O(INR cr)	555,381	878,634	962,262

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.8	20.2	16.7
NSE VIX	18.0	16.2	15.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,482	(0.2) %	13.0 %	Energy	14,950	(0.1) %	12.5 %
IT	14,963	(0.0) %	17.7 %	Pharma	8,893	1.8 %	3.2 %
Metals	2,881	(2.2) %	(18.6) %	Finance	11,670	(0.4) %	13.7 %
Auto	8,675	(0.8) %	(21.6) %	PSU	3,013	(1.0) %	5.6 %
FMCG	30,508	0.1 %	15.1 %	Real Estate	237	0.7 %	(20.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	1,121	5.4 %	(15.7) %	Bandhan Ba	409	(4.1) %	(14.0) %
Sun Pharma	419	5.2 %	(17.5) %	Vedanta	192	(3.5) %	(32.2) %
Havells In	712	5.0 %	40.2 %	Tata Steel	457	(3.2) %	(21.1) %
Wipro	347	2.6 %	19.6 %	M & M	709	(3.0) %	(5.3) %
Piramal En	2,339	2.5 %	(5.3) %	Ashok Leyl	88	(2.9) %	(40.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (DEC)	23-01-2019	0:00	AUD	-	(0.001)
CBA Australia PMI Composite (JAN P)	23-01-2019	22:00	AUD	-	52.9
CBA Australia PMI Mfg (JAN P)	23-01-2019	22:00	AUD	-	54
CBA Australia PMI Services (JAN P)	23-01-2019	22:00	AUD	-	52.7
Retail Sales (MoM) (NOV)	23-01-2019	13:30	CAD	-	0.003
Retail Sales Ex Auto (MoM) (NOV)	23-01-2019	13:30	CAD	-	0
Euro-Zone Consumer Confidence (JAN A)	23-01-2019	15:00	EUR	-	(6.2)
CBI Business Optimism (JAN)	23-01-2019	11:00	GBP	-	(16)
CBI Trends Selling Prices (JAN)	23-01-2019	11:00	GBP	-	14
CBI Trends Total Orders (JAN)	23-01-2019	11:00	GBP	-	8
BOE's Broadbent Speaks in London.	23-01-2019	9:30	GBP	-	-
Foreign Buying Japan Bonds (JAN 18)	23-01-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JAN 18)	23-01-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JAN 18)	23-01-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JAN 18)	23-01-2019	23:50	JPY	-	-
All Industry Activity Index (MoM) (NOV)	23-01-2019	4:30	JPY	-	0.019
Nationwide Department Store Sales (YoY) (DEC)	23-01-2019	5:30	JPY	-	(0.006)
Tokyo Department Store Sales (YoY) (DEC)	23-01-2019	5:30	JPY	-	0.002
Machine Tool Orders (YoY) (DEC F)	23-01-2019	6:00	JPY	-	(0.183)
RBNZ Sectoral Factor Inflation Gauge	23-01-2019	2:00	NZD	-	-
MBA Mortgage Applications (JAN 18)	23-01-2019	12:00	USD	-	0.135
House Price Index (MoM) (NOV)	23-01-2019	14:00	USD	-	0.003
Richmond Fed Manufact. Index (JAN)	23-01-2019	15:00	USD	-	(8)

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