



24 Jan.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,824	(0.1) %	6.0 %
BSE SENSEX	36,108	(0.9) %	8.5 %
CNX BANK	27,191	(0.2) %	11.8 %
CNX MIDCAP	17,357	0.1 %	(9.1) %
CNX SMALLCAP	6,279	(0.0) %	(20.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,576	0.7 %	5.4 %
S&P 500	2,639	0.2 %	5.3 %
FTSE 100	6,843	(0.9) %	1.6 %
HANG SENG	27,008	0.0 %	7.5 %
NIKKEI	20,594	(0.1) %	5.3 %
SHANGHAI COMPOSITE	2,581	0.1 %	4.7 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.33	0.1 %	2.7 %
EUR/USD	1.14	0.1 %	(0.6) %
GBP/USD	1.31	1.5 %	2.6 %
USD/JPY	109.47	(0.1) %	(0.1) %
USD/AUD	1.40	0.2 %	(1.4) %
USD/SGD	1.36	(0.0) %	(0.5) %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.1 %	13.1 %
Gold(INR/10g)	32,341	0.1 %	2.6 %
Gold Comex(USD/oz)	1,282	(0.2) %	(0.7) %
SILVER(INR/1Kg)	38,998	0.6 %	1.9 %
Aluminium(USD/MT)	1,868	1.4 %	0.5 %
Copper(USD/MT)	5,927	(0.4) %	1.5 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	(1.4) %	(1.3) %

**Global Economy:** UK' manufacturing new orders flattened in the quarter to January and sentiment about both the business situation and export prospects tumbled, according to the latest quarterly CBI Industrial Trends Survey. Manufacturers expect volumes to continue growing at a similar pace over the next three months. The Bank of Japan kept its monetary policy unchanged on Wednesday, but downgraded the inflation forecasts, primarily driven by a sharp fall in oil prices. The Policy Board of the BoJ voted 7-2 to purchase government bonds so that the yield of 10-year JGBs will remain at around zero percent. The board maintained interest rate at -0.1% on current accounts that financial institutions maintain at the bank.

**Global Equities:** Sentiments were subdued amid cautious moves by investors due to lingering worries about global economic slowdown and uncertainty about Brexit and US-China trade deal.

**Indian Economy:** The domestic air passenger traffic improved 12.9% to 126.93 lakh in December 2018 over 112.42 lakh in December 2017. The cumulative air passenger traffic of domestic airlines increased 18.6% to 1389.75 lakh in January-December 2018 over 1171.76 lakh in January-December 2017. The Union Cabinet, chaired by the Prime Minister Narendra Modi has given its approval to the Memorandum of Cooperation (MoC) between India and Japan in the field of food processing sector. Bilateral cooperation in the field of food processing between India and Japan will be mutually beneficial to the food processing sector in both countries. Steel Minister Chaudhary Birender Singh has said that the government is considering an increase in the budgetary allocation for research and development to boost the steel sector. The Union Minister for Agriculture and Farmers' Welfare Radha Mohan Singh noted that the Union Budget 2019 will be dedicated to the farmer. It will be another step forward, in contributing to the realization of the goal of doubling farmers' income by the year 2022.

**Indian Equities:** Local stocks saw extended selling today as weak global cues triggered profit selling. Indices took a heavy beating in late trades and the Nifty ended below 10,900 mark after hovering above that level for most part of the day. The barometer index, the S&P BSE Sensex, fell 336.17 points or 0.92% to settle at 36,108.47. The index hit high of 36,521.47 and low of 36,037.90 in intraday trade. The Nifty 50 index fell 91.25 points or 0.84% to settle at 10,831.50. The index hit high of 10,944.80 and low of 10,811.95 in intraday trade.

**Corporate News:** NMDC said that its Sponge Iron Unit (SIU) has re-commenced its operations with lighting up of plant after a long gap of shut down due to administrative reasons. Infosys announced that it has adopted HPE GreenLake to accelerate clients' digital transformation. The partnership will help enterprises make smart infrastructure investments, paying for what they consume, while benefiting from the security offered by a trusted managed services provider. Bharti Infratel's consolidated net profit rose 10.76% to Rs 648.40 crore on 3.03% fall in total income to Rs 1977.20 crore in Q3 December 2018 over Q3 December 2017. Pidilite Industries' consolidated net profit fell 8.49% to Rs 219.47 crore on 20.2% rise in total income to Rs 1880.44 crore in Q3 December 2018 over Q3 December 2017. United Spirits' net profit rose 42.84% to Rs 192.40 crore on 14.99% rise in total income to Rs 2629.70 crore in Q3 December 2018 over Q3 December 2017. Interglobe Aviation's net profit dropped 74.95% to Rs 190.89 crore on 28.4% rise in total income to Rs 8229.37 crore in Q3 December 2018 over Q3 December 2017.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	62.8	(23.3)	(35.7)
MF(INR cr)	108.8	342.6	436.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,833	29,298	34,180
F&O(INR cr)	822,817	875,350	961,572

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.5	20.2	16.7
NSE VIX	18.1	16.3	15.1

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,251	(0.8) %	12.0 %	Energy	14,850	(0.7) %	11.7 %
IT	14,889	(0.5) %	17.2 %	Pharma	8,946	0.6 %	3.8 %
Metals	2,897	0.6 %	(18.2) %	Finance	11,557	(1.0) %	12.6 %
Auto	8,612	(0.7) %	(22.1) %	PSU	2,975	(1.3) %	4.2 %
FMCG	29,991	(1.7) %	13.2 %	Real Estate	236	(0.5) %	(20.5) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Avenue Sup	1,397	2.9 %	2.9 %	ICICI Pru	305	(11.5) %	(20.6) %
Sun Pharma	431	2.9 %	(15.1) %	ITC	277	(4.3) %	7.4 %
Yes Bank	197	2.6 %	(35.6) %	Aditya Bir	87	(3.8) %	(42.5) %
Oracle Fin	3,770	2.3 %	(4.3) %	Motherson	158	(3.1) %	(26.9) %
Sun TV Net	529	2.0 %	(38.4) %	United Spi	580	(2.8) %	(11.2) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (DEC)	24-01-2019	0:30	AUD	-	-
Full Time Employment Change (DEC)	24-01-2019	0:30	AUD	-	-
Part Time Employment Change (DEC)	24-01-2019	0:30	AUD	-	-
Participation Rate (DEC)	24-01-2019	0:30	AUD	-	0.657
Unemployment Rate (DEC)	24-01-2019	0:30	AUD	-	0.051
ECB Deposit Facility Rate (JAN 24)	24-01-2019	12:45	EUR	-	(0.004)
ECB Marginal Lending Facility (JAN 24)	24-01-2019	12:45	EUR	-	0.0025
European Central Bank Rate Decision (JAN 24)	24-01-2019	12:45	EUR	-	0
Markit France Composite PMI (JAN P)	24-01-2019	8:15	EUR	-	48.7
Markit France Manufacturing PMI (JAN P)	24-01-2019	8:15	EUR	-	49.7
Markit France Services PMI (JAN P)	24-01-2019	8:15	EUR	-	49
Markit Germany Services PMI (JAN P)	24-01-2019	8:30	EUR	-	51.8
Markit/BME Germany Composite PMI (JAN P)	24-01-2019	8:30	EUR	-	51.6
Markit/BME Germany Manufacturing PMI (JAN P)	24-01-2019	8:30	EUR	-	51.5
Markit Eurozone Composite PMI (JAN P)	24-01-2019	9:00	EUR	-	51.1
Markit Eurozone Manufacturing PMI (JAN P)	24-01-2019	9:00	EUR	-	51.4
Markit Eurozone Services PMI (JAN P)	24-01-2019	9:00	EUR	-	51.2
Nikkei Japan PMI Manufacturing (JAN P)	24-01-2019	0:30	JPY	-	52.6
Tokyo Consumer Price Index (YoY) (JAN)	24-01-2019	23:30	JPY	-	0.003
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (JAN)	24-01-2019	23:30	JPY	-	0.009
Tokyo Consumer Price Index Ex-Fresh Food, Energy (YoY) (JAN)	24-01-2019	23:30	JPY	-	0.006
Coincident Index (NOV F)	24-01-2019	5:00	JPY	-	103
Leading Index CI (NOV F)	24-01-2019	5:00	JPY	-	99.3
Bi-Weekly Core CPI (JAN 15)	24-01-2019	14:30	MXN	-	0.0007
Bi-Weekly CPI (JAN 15)	24-01-2019	14:30	MXN	-	(0.0006)
Bi-Weekly CPI (YoY) (JAN 15)	24-01-2019	14:30	MXN	-	0.0466
Credit Card Spending (MoM) (DEC)	24-01-2019	2:00	NZD	-	0.004
Credit Card Spending (YoY) (DEC)	24-01-2019	2:00	NZD	-	0.061
Markit New Zealand Composite PMI (NOV F)	24-01-2019	21:45	NZD	-	46.60



Continuing Claims (JAN 12)	24-01-2019	13:30	USD	-	-
Initial Jobless Claims (JAN 19)	24-01-2019	13:30	USD	-	-
Markit US Composite PMI (JAN P)	24-01-2019	14:45	USD	-	54.4
Markit US Manufacturing PMI (JAN P)	24-01-2019	14:45	USD	-	53.8
Markit US Services PMI (JAN P)	24-01-2019	14:45	USD	-	54.4
Leading Index (DEC)	24-01-2019	15:00	USD	-	0.002
EIA Natural Gas Storage Change (JAN 18)	24-01-2019	15:30	USD	-	(81)
EIA Working Natural Gas Implied Flow (JAN 18)	24-01-2019	15:30	USD	-	(81)
DOE Cushing OK Crude Inventory (JAN 18)	24-01-2019	16:00	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 18)	24-01-2019	16:00	USD	-	-
DOE U.S. Distillate Inventory (JAN 18)	24-01-2019	16:00	USD	-	-
DOE U.S. Gasoline Inventories (JAN 18)	24-01-2019	16:00	USD	-	-
Kansas City Fed Manf. Activity (JAN)	24-01-2019	16:00	USD	-	3
U.S. to Sell 4-Week Bills	24-01-2019	16:30	USD	-	-
U.S. to Sell 8-Week Bills	24-01-2019	16:30	USD	-	-

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