



24 Dec.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,748	(0.1) %	5.2 %
BSE SENSEX	35,742	(1.9) %	7.4 %
CNX BANK	26,863	(0.0) %	10.4 %
CNX MIDCAP	17,681	(0.1) %	(7.4) %
CNX SMALLCAP	6,365	(0.2) %	(19.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,445	(1.8) %	(9.6) %
S&P 500	2,417	(2.1) %	(10.4) %
FTSE 100	6,721	0.1 %	(12.1) %
HANG SENG	25,753	0.5 %	(15.6) %
NIKKEI	20,166	(1.1) %	(14.2) %
SHANGHAI COMPOSITE	2,516	(0.8) %	(24.9) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.17	0.7 %	10.2 %
EUR/USD	1.14	(0.7) %	(5.3) %
GBP/USD	1.26	(0.2) %	(6.4) %
USD/JPY	111.21	0.0 %	(1.3) %
USD/AUD	1.42	1.1 %	11.1 %
USD/SGD	1.37	0.4 %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	(1.0) %	(24.8) %
Gold(INR/10g)	31,114	0.2 %	6.0 %
Gold Comex(USD/oz)	1,259	(0.4) %	(3.8) %
SILVER(INR/1Kg)	36,635	(0.6) %	(5.1) %
Aluminium(USD/MT)	1,920	(0.2) %	(14.9) %
Copper(USD/MT)	5,987	(0.5) %	(16.6) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.3 %

**Global Economy:** Reflecting downward revisions to consumer spending and exports, the Commerce Department released a report showing slightly slower than previously estimated US economic growth in the third quarter. The report said real gross domestic product rose by 3.4% in the third quarter compared to the previously estimated 3.5% rise. The University of Michigan reported an improvement in US consumer sentiment in the month of December. The consumer sentiment index for December was upwardly revised to 98.3 from a preliminary reading of 97.5. The US Commerce Department said durable goods orders climbed by 0.8% in November after plunging by 4.3% in October. German forward-looking consumer confidence indicator is set to show a reading of 10.4 in January, unchanged from December, the market research group GfK said. The consumer confidence is set to remain steady at the start of next year as the divide between expectations on overall economic situation and personal finances widened further. The economic expectations index of the survey shed 3.3 points to reach 14.1. The reading was the lowest since February 2017, when the score was 9.7, the GfK said.

**Global Equities:** DOW tumbled to fresh one year low as a partial US government shutdown took effect after President Donald Trump told House Republicans he would refuse to sign an appropriations bill passed by the Senate that would avert a shutdown, unless both houses of Congress agree to appropriate \$5 billion in extra funds for expansion of the US southern border wall.

**Indian Economy:** According to the weekly sowing data published on Friday, rabi sowing has covered a total area of 512.53 lakh hectares (lh), about 4.6% lower than 537.12 lh covered in the same period in 2017-19. The air passenger traffic of domestic airlines has increased at 51-months low pace of 11.0% to 116.45 lakh in November 2018 over 104.89 lakh in November 2017. The cumulative air passenger traffic increased 19.2% to 1262.82 lakh in January-November 2018 over 1059.34 lakh in January-November 2017. India's foreign exchange reserves declined by US\$ 0.614 billion to US\$ 393.12 billion in the week ended 14 December 2018. The foreign exchange reserves had stood at US\$ 393.73 a week ago. The water storage available in 91 major reservoirs of the country for the week ending on 20 December 2018 was 88.943 billion cubic meters (bcm), which is 55% of total storage capacity of these reservoirs. This percentage was at 57% for the week ending on 13 December 2018.

**Equity Markets:** The local market declined last week on negative global cues. US Federal Reserve's plans to continue its balance sheet reduction and the threat of a partial US government shutdown triggered selling across the globe. However a sharp fall in crude oil prices supported shares at lower levels. The domestic market declined in two out of five trading sessions. In the week ended Friday, 21 December 2018, the Sensex fell 220.86 points or 0.61% to settle at 35,742.07. The Nifty 50 index fell 51.45 points or 0.48% to settle at 10,754.

**Corporate News:** The Goods and Services Tax (GST) Council on Saturday cut rates on 23 items such as televisions and movie tickets while keeping tax rate on cement and auto parts unchanged. Additionally, the Council proposed to cut GST rates on six of the items from 28% to 18%. Retreated Tyres, video games and sporting equipment, movie tickets, billiards and snookers and lithium battery power banks will attract 18% GST. Power Grid Corporation of India has acquired Jawaharpur Firozabad Transmission (JFTL), the Project SPV to establish Transmission System for Evacuation of Power from 2 x 660 MW Jawaharpur Thermal Power Project and construction of 400 kV substation at Firozabad. Info Edge (India) has invested through its wholly-owned subsidiary, about Rs.28 crore in Nopaperforms Solutions, a SaaS based platform bringing digital transformation through automation of marketing and enrolments of education institutions.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(89.6)	30.6	(37.4)
MF(INR cr)	462.8	92.0	451.3

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	38,943	31,605	34,768
F&O(INR cr)	958,378	916,487	966,222

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.1	23.0	16.1
NSE VIX	16.0	16.8	15.0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,870	(1.5) %	10.4 %	Energy	14,160	(1.8) %	6.5 %
IT	14,208	(2.3) %	11.8 %	Pharma	8,774	(0.9) %	1.8 %
Metals	3,162	(0.5) %	(10.7) %	Finance	11,439	(1.4) %	11.5 %
Auto	9,337	(2.0) %	(15.6) %	PSU	3,034	(0.5) %	6.3 %
FMCG	30,200	(1.8) %	14.0 %	Real Estate	239	(2.0) %	(19.5) %

### 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>
HPCL	250	2.3 %	(27.4) %	IOCL	140	(5.5) %	(18.0) %
Bosch	19,898	1.5 %	7.5 %	Shriram Tr	1,201	(5.3) %	(18.2) %
ICICI Pru	327	1.1 %	(15.0) %	UPL	736	(4.5) %	(2.2) %
BPC L	375	1.0 %	(11.5) %	Pidilite I	1,142	(4.2) %	21.4 %
Petronet L	223	0.9 %	(3.2) %	L&T Fin.Ho	151	(3.9) %	(5.8) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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