



25 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,850	0.0 %	6.2 %
BSE SENSEX	36,195	0.2 %	9.0 %
CNX BANK	27,266	0.0 %	12.1 %
CNX MIDCAP	17,281	0.0 %	(9.5) %
CNX SMALLCAP	6,258	0.0 %	(21.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,553	(0.1) %	5.3 %
S&P 500	2,642	0.1 %	5.4 %
FTSE 100	6,819	(0.4) %	1.3 %
HANG SENG	27,121	0.4 %	7.9 %
NIKKEI	20,575	(0.1) %	5.2 %
SHANGHAI COMPOSITE	2,592	0.4 %	5.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.08	(0.5) %	2.4 %
EUR/USD	1.13	(0.4) %	(1.1) %
GBP/USD	1.31	1.3 %	3.0 %
USD/JPY	109.71	0.1 %	0.1 %
USD/AUD	1.41	0.4 %	(0.9) %
USD/SGD	1.36	(0.1) %	(0.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	1.0 %	14.2 %
Gold(INR/10g)	32,226	(0.4) %	2.2 %
Gold Comex(USD/oz)	1,280	(0.2) %	(0.9) %
SILVER(INR/1Kg)	38,718	(0.7) %	1.2 %
Aluminium(USD/MT)	1,878	0.5 %	1.0 %
Copper(USD/MT)	5,921	(0.1) %	1.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	1.4 %	0.1 %

Global Economy: The US Conference Board said its leading economic index edged down by 0.1% in December after rising by 0.2% in November. Risks to the euro area growth are now tilted to the downside, thanks to persistent uncertainties such as protectionism, European Central Bank President Mario Draghi acknowledged on Thursday, after policymakers left the key interest rates and forward guidance unchanged. Eurozone private sector expanded at the weakest pace in five-and-a-half years at the start of the year, led by weaker pace of growth in both manufacturing and services, defying expectations for further improvement, preliminary survey data from IHS Markit showed on Thursday. The flash Composite Purchasing Managers' Index, or PMI, dropped to a 66-month low of 50.7 from 51.1 in December. A score above 50 suggests growth in the private sector. Japan manufacturing sector fell into stagnation in December with a manufacturing PMI score of 50.0, the latest survey from Nikkei revealed on Thursday. That's down from 52.6 in December and it lands right on the line that separates expansion from contraction. Individually, exports tumbled at the fastest pace in two and a half years, while production scaled back for the first time since July 2016. Australia jobless rate came in at a seasonally adjusted 5% in December, the Australian Bureau of Statistics said as compared to 5.1% in November.

Global Equities: Stocks edged up as investors awaited fresh developments on China trade talks. Some weakness was seen in European markets but Asian stocks stayed supported.

Indian Economy: India's crude oil production declined 4.3% to 2.86 million tonnes (mt) in December 2018 over December 2017. Crude oil output declined 3.7% to 25.94 mt in April-December period of the fiscal year ending March 2019 (April-December 2018). India's natural gas production increased 4.2% to 2.87 billion cubic meters (bcm) in December 2018 over a year ago. Natural gas output fell 0.2% to 24.65 bcm in April-December 2018 over April-December 2017.

Equity Markets: Local stocks ended with modest gains after trading in a narrow range for most part of trading session. Gains in late trade were backed by rally in Yes Bank and firmness in Reliance Industries and TCS. The Sensex and the Nifty pared gains and traded near flat line in mid-morning trade. Indices turned range bound in afternoon trade. Benchmarks jumped in late trade.

Corporate News: Biocon's net profit rose 136.34% to Rs 217.20 crore on 45.65% increase in net sales to Rs 1540.80 crore in Q3 December 2018 over Q3 December 2017. On a consolidated basis, PNB Housing Finance's net profit rose 32.04% to Rs 302.97 crore on 46.76% increase in total income to Rs 2078.46 crore in Q3 December 2018 over Q3 December 2017. Larsen & Toubro and Maruti Suzuki India will announce October-December 2018 quarterly results today, 25 January 2019. Yes Bank announced the appointment of Mr. Maheswar Sahu and Mr. Anil Jaggia as additional directors (independent) with effect from 24 January 2019 for a period of 5 years. Further, the bank said that Reserve Bank of India (RBI) has vide its letter dated 23 January 2019 approved the appointment of Ravneet Gill as the MD & CEO of Yes Bank for a period of 3 years from the date of joining.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(149.9)	(30.7)	(36.2)
MF(INR cr)	746.1	366.2	438.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	31,407	29,415	34,167
F&O(INR cr)	1,641,864	917,934	964,923

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.9	20.1	16.8
NSE VIX	17.4	16.4	15.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,266	0.1 %	12.1 %	Energy	14,990	0.9 %	12.8 %
IT	14,972	0.6 %	17.8 %	Pharma	8,895	(0.6) %	3.2 %
Metals	2,894	(0.1) %	(18.3) %	Finance	11,545	(0.1) %	12.5 %
Auto	8,537	(0.9) %	(22.8) %	PSU	2,992	0.6 %	4.8 %
FMCG	30,037	0.2 %	13.3 %	Real Estate	241	2.2 %	(18.8) %

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>
Yes Bank	215	9.2 %	(29.7) %	Bharti Inf	263	(5.1) %	(22.1) %
Interglobe	1,179	6.2 %	(11.3) %	Ashok Leyl	85	(4.9) %	(42.7) %
Shriram Tr	1,115	2.4 %	(24.1) %	HDFC Stand	361	(3.3) %	(25.2) %
Aditya Bir	89	2.3 %	(41.1) %	Tata Motor	93	(2.9) %	(51.0) %
ICICI Lomb	848	1.9 %	8.2 %	A B B	1,258	(2.7) %	(2.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
ECB Survey of Professional Forecasters	25-01-2019	9:00	EUR	-	-
German IFO Business Climate (JAN)	25-01-2019	9:00	EUR	-	101
German IFO Current Assessment (JAN)	25-01-2019	9:00	EUR	-	104.7
German IFO Expectations (JAN)	25-01-2019	9:00	EUR	-	97.3
CBI Reported Sales (JAN)	25-01-2019	11:00	GBP	-	(13)
CBI Total Dist. Reported Sales (JAN)	25-01-2019	11:00	GBP	-	10
BBA Loans for House Purchase (DEC)	25-01-2019	9:30	GBP	-	39403
BOJ Outright Bond Purchase 5~10 Years	25-01-2019	1:10	JPY	-	-
Cap Goods Orders Nondef Ex Air (DEC P)	25-01-2019	13:30	USD	-	-
Cap Goods Ship Nondef Ex Air (DEC P)	25-01-2019	13:30	USD	-	-
Durable Goods Orders (DEC P)	25-01-2019	13:30	USD	-	-
Durables Ex Transportation (DEC P)	25-01-2019	13:30	USD	-	-
New Home Sales (DEC)	25-01-2019	15:00	USD	-	-
New Home Sales (MoM) (DEC)	25-01-2019	15:00	USD	-	-
Baker Hughes U.S. Rig Count (JAN 25)	25-01-2019	18:00	USD	-	1050

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