



25 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,802	0.1 %	5.8 %
BSE SENSEX	35,871	(0.1) %	8.1 %
CNX BANK	26,984	0.4 %	10.9 %
CNX MIDCAP	16,566	0.1 %	(13.3) %
CNX SMALLCAP	5,904	0.4 %	(25.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,032	0.7 %	11.6 %
S&P 500	2,793	0.6 %	11.4 %
FTSE 100	7,179	0.2 %	6.6 %
HANG SENG	28,816	0.7 %	14.7 %
NIKKEI	21,426	(0.2) %	9.5 %
SHANGHAI COMPOSITE	2,804	1.9 %	13.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.14	(0.1) %	2.5 %
EUR/USD	1.13	(0.0) %	(1.0) %
GBP/USD	1.31	0.1 %	2.4 %
USD/JPY	110.69	(0.0) %	1.0 %
USD/AUD	1.40	(0.5) %	(1.3) %
USD/SGD	1.35	(0.2) %	(1.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	0.5 %	23.0 %
Gold(INR/10g)	33,252	(0.8) %	5.5 %
Gold Comex(USD/oz)	1,327	0.4 %	2.8 %
SILVER(INR/1Kg)	40,121	(0.4) %	4.9 %
Aluminium(USD/MT)	1,891	1.7 %	1.7 %
Copper(USD/MT)	6,489	1.5 %	11.1 %

FIXED INCOME

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

Global Economy: Germany's gross domestic product was unchanged in the fourth quarter from the third quarter, when the economy shrank 0.2%, latest data from the Federal Statistical Office confirmed on Friday. Positive contributions to growth came from domestic demand with a 0.9% increase in gross fixed capital formation. Investment grew 1.3% in construction and 0.7% in machinery and equipment. Household consumption edged up 0.2% after a 0.3% decline in the previous quarter. Germany's business confidence fell for a sixth straight month in February to its lowest level in over four years, as firms continue to worry that the economic outlook is set to turn bleak due to worsening global trade tensions and political crises such as Brexit. The business confidence index dropped to 98.5 from an upwardly revised 99.3 in January, results of a survey by the Munich-based Ifo Institute showed on Friday. Eurozone's consumer price index rose 1.4 percent year-on-year in January, in line with the flash estimate released on February 1, latest data from Eurostat confirmed on Friday. Inflation eased for a third straight month in January to its lowest level in nine months, thanks to slower increase in energy prices, while core inflation accelerated at a faster than estimated pace. December's annual inflation figure was revised down to 1.5% from 1.6%. Inflation was the lowest since April last year, when it was a revised 1.2%.

Global Equities: Sentiments look supported as President Donald Trump tweeted that substantial progress has been made in China trade talks so he will delay raising US tariffs on March 1.

Indian Economy: India's Crude oil production during January, 2019 was 2847.66TMT which is 11.85% lower than target and 4.33% lower when compared with January, 2018. Cumulative crude oil production during April-January, 2018-19 was 28785.26 TMT which is 6.46% and 3.76% lower than the cumulative target and production respectively during the corresponding period of last year. Natural gas production during January, 2019 was 2841.45 MMSCM which is 8.75% lower than the target for the month but 5.43% higher when compared with January, 2018. Cumulative natural gas production during April-January, 2018-19 was 27491.66MMSCM which is 7.42% lower than target for the period but 0.4% higher when compared with the production during corresponding period of last year.

Equity Markets: The Sensex and the Nifty ended near flat line amid mixed cues from other Asian shares. Selling in Kotak Mahindra Bank, HDFC Bank and Reliance Industries capped gains. The indices opened lower, but bounced back in morning trade. The recovery was short lived as indices slipped once again in mid-morning trade.

Corporate News: Real estate shares will be watched. The Goods and Services Tax (GST) Council in its 33rd meeting held on 24 February 2019, recommended that GST shall be levied at effective GST rate of 5%, without input tax credit (ITC), on residential properties outside affordable segment. GST shall be levied at effective GST of 1%, without ITC, on affordable housing properties. Kotak Mahindra Bank will be watched. ING Group on Friday, 22 February 2019, sold its entire 3.06% stake in Kotak Mahindra Bank through two block deals on the National Stock Exchange. With ING Group's exit, Mark Newman, a non-executive non-independent director at Kotak Mahindra Bank, has resigned with immediate effect. NTPC said that Unit 3 of 250 MW of Nabinagar Thermal Power Project (4 X 250 MW) of Bhartiya Rail Bijlee Company (BRBCL), a subsidiary of NTPC, has been declared on commercial operation from 20 February 2019.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(47.5)	(6.8)	(31.2)
MF(INR cr)	453.9	609.6	441.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	41,820	34,023	34,277
F&O(INR cr)	464,334	872,670	961,625

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.5	15.3	16.7
NSE VIX	15.5	16.2	15.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,868	(0.7) %	10.4 %	Energy	14,777	(0.1) %	11.2 %
IT	15,685	0.6 %	23.4 %	Pharma	8,773	0.8 %	1.8 %
Metals	2,842	1.6 %	(19.7) %	Finance	11,320	(0.6) %	10.3 %
Auto	8,279	1.5 %	(25.1) %	PSU	2,777	0.8 %	(2.7) %
FMCG	29,241	0.3 %	10.3 %	Real Estate	233	1.5 %	(21.3) %

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>
Aditya Bir	87	5.9 %	(42.9) %	Kotak Mah.	1,238	(4.0) %	12.9 %
Motherson	144	5.7 %	(33.4) %	Vodafone I	30	(2.1) %	(61.0) %
IOCL	137	4.7 %	(19.5) %	Container	476	(1.4) %	(4.2) %
HPCL	231	3.6 %	(33.0) %	GAIL (Indi	327	(1.4) %	0.7 %
Yes Bank	222	3.2 %	(27.5) %	Reliance I	1,232	(1.2) %	38.0 %

EVENTS CALENDAR

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

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