



26 Dec.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,552	(1.0) %	3.3 %
BSE SENSEX	35,470	(0.8) %	5.6 %
CNX BANK	26,425	(1.1) %	8.6 %
CNX MIDCAP	17,240	(2.0) %	(9.7) %
CNX SMALLCAP	6,198	(1.8) %	(21.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,792	(2.9) %	(12.2) %
S&P 500	2,351	(2.7) %	(12.8) %
FTSE 100	6,686	(0.5) %	(12.6) %
HANG SENG	25,651	(0.4) %	(15.9) %
NIKKEI	20,166	(1.1) %	(14.2) %
SHANGHAI COMPOSITE	2,527	0.4 %	(24.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.14	(0.1) %	10.2 %
EUR/USD	1.14	0.4 %	(5.0) %
GBP/USD	1.27	0.5 %	(6.0) %
USD/JPY	110.22	(0.9) %	(2.2) %
USD/AUD	1.42	(0.3) %	10.7 %
USD/SGD	1.37	(0.1) %	2.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	(5.7) %	(29.1) %
Gold(INR/10g)	31,190	0.2 %	6.2 %
Gold Comex(USD/oz)	1,276	1.4 %	(2.5) %
SILVER(INR/1Kg)	36,717	0.2 %	(4.9) %
Aluminium(USD/MT)	1,899	(1.1) %	(15.8) %
Copper(USD/MT)	5,932	(0.9) %	(17.4) %

FIXED INCOME

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

Global Economy: The United States Treasury Secretary Steven Mnuchin stated that he had contacted the heads of biggest American banks and said they had ample liquidity available for lending. The Central Economic Work Conference, a top leadership group, said that Beijing would cut taxes and spend more to spur economic growth. UK commercial vehicle production increased 26.5% in November, according to figures released by the Society of Motor Manufacturers and Traders (SMMT). While the low volumes associated with CV manufacturing can result in large percentage swings, the doubling in output for the home market helped manufacturing jump by a quarter. Although the number of CVs built for overseas customers fell -9.4% in the month, production for the UK market more than compensated, rising by 2,070 units. The increase follows large fleet orders from British businesses and unusually weak performances over the same period in 2016 and 2017. Year-to-date production figures remain broadly stable, increasing 5.0% on 2017, with manufacturing for the domestic market up 11.8%, and export demand up 0.8%. Singapore's inflation eased to its lowest level in seven months, mainly due to a sharp fall in private road transportation costs, figures from the Statistics Singapore and the Monetary Authority of Singapore showed. The consumer price inflation eased to 0.3% from 0.7% in each of the previous three months.

Global Equities: US investors waited for the reaction from the partial shutdown of the United States government over an impasse between President Trump and lawmakers over his hopes to get money to build a wall on the country's border with Mexico.

Indian Economy: Domestic Crude oil production during November, 2018 was 2780.60 TMT which is 9.54% lower than target and 3.47% lower when compared with November, 2017. Cumulative crude oil production during April-November, 2018 was 23075.19 TMT which is 5.26% lower than target for the period and 3.63% lower than production during corresponding period of last year. Natural gas production during November, 2018 was 2731.79 MMSCM which is 7.03% lower than the target for the month and 0.62% higher when compared with November, 2017. Cumulative natural gas production during April-November, 2018 was 21783.74 MMSCM which is 7.57% lower than target for the period and 0.69% lower than the production during corresponding period of last year.

Equity Markets: Local stocks ended lower for third session in a row amid negative global cues. Key indices opened with minor losses and traded in a narrow range with small losses in mid-morning trade. Indices hit fresh intraday low in early afternoon trade as selling picked up pace. Indices came off day's low in afternoon trade and were trading in a narrow range in mid-afternoon trade. Indices witnessed steep selling pressure in the last hour of trade.

Corporate News: Godrej Industries announced that the Scheme of Amalgamation of Vora Soaps with the company has become effective post filing of e-Form INC-28 by the Company on 24 December 2018 with the Registrar of Companies, Mumbai. The Board of Directors Max India has considered and approved a composite scheme of amalgamation and arrangement amongst Max India, Max Healthcare, Radiant Life Care and wholly owned subsidiary of the Company to be incorporated for this purpose and their respective shareholders and creditors. Adani Transmission has acquired 100% equity share capital of Obra-C Badaun Transmission (OCBTL) from PFC Consulting (PFCCL). OCBTL was incorporated in August, 2018 by PFCCL to build, own, operate and maintain the transmission project in Uttar Pradesh.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1.0	28.6	(37.2)
MF(INR cr)	(283.8)	66.9	447.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	26,271	31,271	34,721
F&O(INR cr)	938,436	917,859	966,069

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.1	23.0	16.1
NSE VIX	15.8	16.7	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	26,715	(0.6) %	9.8 %	Energy	13,989	(1.2) %	5.3 %
IT	14,248	0.3 %	12.1 %	Pharma	8,726	(0.5) %	1.2 %
Metals	3,090	(2.3) %	(12.7) %	Finance	11,334	(0.9) %	10.5 %
Auto	9,207	(1.4) %	(16.7) %	PSU	3,046	0.4 %	6.7 %
FMCG	29,951	(0.8) %	13.0 %	Real Estate	233	(2.1) %	(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>
B H E L	71	2.0 %	(13.6) %	Avenue Sup	1,546	(6.2) %	13.9 %
Wipro	327	1.4 %	12.8 %	JSW Steel	292	(5.1) %	(1.5) %
TCS	1,919	1.2 %	31.9 %	DLF	178	(4.8) %	(11.4) %
L&T Fin.Ho	153	1.1 %	(4.7) %	Hero Motoc	3,168	(4.7) %	(13.1) %
Bharti Inf	263	1.0 %	(22.2) %	Motherson	162	(4.3) %	(25.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
BOJ Kuroda makes a speech in Keidanren	26-12-2018	4:00	JPY	-	-
S&P CoreLogic CS 20-City (MoM) SA (OCT)	26-12-2018	14:00	USD	-	0.0033
S&P/Case-Shiller 20-City Index n.s.a (OCT)	26-12-2018	14:00	USD	-	213.76
S&P/Case-Shiller Composite-20 (YoY) (OCT)	26-12-2018	14:00	USD	-	0.0515
S&P/Case-Shiller US Home Price Index (OCT)	26-12-2018	14:00	USD	-	205.82
S&P/Case-Shiller US Home Price Index (YoY) (OCT)	26-12-2018	14:00	USD	-	0.0551
Richmond Fed Manufact. Index (DEC)	26-12-2018	15:00	USD	-	14
U.S. to Sell USD18 Bln 2-Year Floating Rate Notes Reopening	26-12-2018	16:30	USD	-	-
U.S. to Sell USD41 Bln 5-Year Notes	26-12-2018	18:00	USD	-	-

..... End of Report