



27 Dec.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,730	0.0 %	5.1 %
BSE SENSEX	35,650	0.5 %	7.9 %
CNX BANK	26,987	0.0 %	10.9 %
CNX MIDCAP	17,573	0.0 %	(8.0) %
CNX SMALLCAP	6,315	0.0 %	(20.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,878	5.0 %	(7.8) %
S&P 500	2,468	5.0 %	(8.5) %
FTSE 100	6,686	(0.5) %	(12.6) %
HANG SENG	25,651	(0.4) %	(15.9) %
NIKKEI	19,327	0.9 %	(17.8) %
SHANGHAI COMPOSITE	2,498	(0.3) %	(25.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.08	(0.1) %	10.1 %
EUR/USD	1.14	0.0 %	(5.3) %
GBP/USD	1.27	0.1 %	(6.3) %
USD/JPY	110.98	(0.2) %	(1.5) %
USD/AUD	1.42	(0.3) %	10.8 %
USD/SGD	1.37	(0.1) %	2.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	0.7 %	(29.1) %
Gold(INR/10g)	31,452	0.8 %	7.1 %
Gold Comex(USD/oz)	1,276	1.4 %	(2.5) %
SILVER(INR/1Kg)	37,124	1.1 %	(3.8) %
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:** China is likely to overtake the US as the world's largest economy by 2032, according to the 2019 edition of the World Economic League Table (Welt). Last year the Welt predicted that China would become the largest economy in 2030 but the US is currently on track to retain the top spot for two years longer than previously expected, despite an increasing public debt burden. The analysis has predicted that Brexit disruption will depress UK growth in 2019, helping France to overtake the UK to claim sixth place in the rankings. The Welt is produced by international economic forecasters at the London-based Centre for Economics and Business Research (Cebr).

**Global Equities:** The Dow Jones added more than 1,000 points, recording its biggest one-day point-gain ever. Investors recouped all their losses from Wall Street's Christmas Eve plunge as stocks rallied across all sectors, giving markets their best single-day percentage gain in 10 years. Major markets across Europe remained closed on Wednesday for Boxing Day holiday.

**Indian Economy:** India is expected to move past the UK and France, probably in 2019 but, if not then, in 2020, according to Welt data. Ministry of Power, Government of India has decided to make all meters smart prepaid in 3 years from 1st April, 2019. This step is likely to bring revolution in power sector by way of reduction in AT&C losses, better health of DISCOMs, incentivisation of energy conservation, ease of bill payments and doing away with the paper bills.

**Equity Markets:** Domestic stocks ended with modest gains after a highly volatile session of trade. A sharp recovery across sectors and gains were supported by upmove in sectoral pivots. Indices had ended lower in prior three trading sessions. Key indices opened lower and extended losses in morning trade. Indices trimmed losses in early afternoon trade. Market wiped off losses and bounced into positive terrain in mid-afternoon trade. Benchmarks extended gains in late trade.

**Corporate News:** Shares of Sun Pharmaceutical Industries will be in focus. DUSA Pharmaceuticals, Inc., (DUSA), a wholly owned subsidiary of Sun Pharmaceutical Industries announced that DUSA has been granted preliminary injunctive relief by a federal district court prohibiting defendants Biofrontera Inc., Biofrontera Bioscience GmbH, Biofrontera Pharma GmbH, and Biofrontera AG (together known as Biofrontera) from using DUSA's confidential and proprietary trade secret information. NTPC said that investment approval has been accorded for Bilhaur Solar PV Project of 140 MW capacity and Auraiya Solar PV Project of 20 MW capacity.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(124.4)	19.1	(37.7)
MF(INR cr)	(223.4)	70.9	447.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,969	31,195	34,695
F&O(INR cr)	1,522,812	953,444	969,128

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	36.1	23.8	16.2
NSE VIX	15.9	16.7	15.0

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,987	1.0 %	10.9 %	Energy	14,064	0.5 %	5.8 %
IT	14,159	(0.6) %	11.4 %	Pharma	8,685	(0.5) %	0.7 %
Metals	3,098	0.3 %	(12.5) %	Finance	11,476	1.2 %	11.8 %
Auto	9,227	0.2 %	(16.6) %	PSU	3,062	0.5 %	7.3 %
FMCG	29,996	0.2 %	13.2 %	Real Estate	234	0.2 %	(21.1) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Adani Port	377	4.3 %	1.9 %	New India	176	(4.3) %	(50.0) %
Zee Entert	455	4.2 %	(21.4) %	Oracle Fin	3,562	(2.7) %	(9.6) %
Siemens	1,036	4.0 %	(6.0) %	Sun Pharma	414	(2.5) %	(18.5) %
Bandhan Ba	545	4.0 %	14.6 %	General In	257	(2.3) %	(30.4) %
Ambuja Cem	221	3.7 %	(8.0) %	Yes Bank	179	(1.6) %	(41.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
CFIB Business Barometer (DEC)	27-12-2018	11:00	CAD	-	61.2
Credit Suisse Survey Expectations (DEC)	27-12-2018	9:00	CHF	-	(42.3)
Swift Global Payments CNY (NOV)	27-12-2018	1:00	CNY	-	0.017
Industrial Profits (YoY) (NOV)	27-12-2018	1:30	CNY	-	0.036
ECB Publishes Economic Bulletin (DEC 13)	27-12-2018	9:00	EUR	-	-
BOJ Outright Bond Purchase 10~25 Years	27-12-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	27-12-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	27-12-2018	1:10	JPY	-	-
Jobless Rate (NOV)	27-12-2018	23:30	JPY	-	0.024
Job-To-Applicant Ratio (NOV)	27-12-2018	23:30	JPY	-	1.62
Tokyo Consumer Price Index (YoY) (DEC)	27-12-2018	23:30	JPY	-	0.008
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (DEC)	27-12-2018	23:30	JPY	-	0.01
Tokyo CPI Ex-Fresh Food, Energy (YoY) (DEC)	27-12-2018	23:30	JPY	-	0.006
BOJ Summary of Opinions (DEC 20)	27-12-2018	23:50	JPY	-	-
Foreign Buying Japan Bonds (DEC 21)	27-12-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (DEC 21)	27-12-2018	23:50	JPY	-	-
Industrial Production (MoM) (NOV P)	27-12-2018	23:50	JPY	-	0.029
Industrial Production (YoY) (NOV P)	27-12-2018	23:50	JPY	-	0.042
Japan Buying Foreign Bonds (Yen) (DEC 21)	27-12-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (DEC 21)	27-12-2018	23:50	JPY	-	-
Large Retailers' Sales (NOV)	27-12-2018	23:50	JPY	-	(0.008)
Retail Trade (YoY) (NOV)	27-12-2018	23:50	JPY	-	0.035
Retail Trade s.a. (MoM) (NOV)	27-12-2018	23:50	JPY	-	0.012
Annualized Housing Starts (NOV)	27-12-2018	5:00	JPY	-	-
Construction Orders (YoY) (NOV)	27-12-2018	5:00	JPY	-	(0.165)
Housing Starts (YoY) (NOV)	27-12-2018	5:00	JPY	-	0.003
Continuing Claims (DEC 15)	27-12-2018	13:30	USD	-	-
Initial Jobless Claims (DEC 22)	27-12-2018	13:30	USD	-	-
House Price Index (MoM) (OCT)	27-12-2018	14:00	USD	-	0.002



Conf. Board Expectations (DEC)	27-12-2018	15:00	USD	-	111
Conf. Board Present Situation (DEC)	27-12-2018	15:00	USD	-	172.7
Consumer Confidence Index (DEC)	27-12-2018	15:00	USD	-	135.7
New Home Sales (MoM) (NOV)	27-12-2018	15:00	USD	-	(0.089)
New Home Sales (NOV)	27-12-2018	15:00	USD	-	-
U.S. to Sell 4-Week Bills	27-12-2018	16:30	USD	-	-
U.S. to Sell 8-Week Bills	27-12-2018	16:30	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	27-12-2018	18:00	USD	-	-

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