



28 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,798	0.2 %	5.7 %
BSE SENSEX	36,026	(0.5) %	8.4 %
CNX BANK	27,108	(0.0) %	11.4 %
CNX MIDCAP	16,939	(0.4) %	(11.3) %
CNX SMALLCAP	6,139	(0.3) %	(22.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,737	0.8 %	6.0 %
S&P 500	2,665	0.9 %	6.3 %
FTSE 100	6,809	(0.1) %	1.1 %
HANG SENG	27,569	1.7 %	9.7 %
NIKKEI	20,774	1.0 %	6.2 %
SHANGHAI COMPOSITE	2,602	0.4 %	5.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.17	0.1 %	2.5 %
EUR/USD	1.14	0.7 %	(0.4) %
GBP/USD	1.32	0.5 %	3.5 %
USD/JPY	109.54	(0.2) %	(0.1) %
USD/AUD	1.39	(1.1) %	(2.0) %
USD/SGD	1.35	(0.4) %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	1.0 %	14.2 %
Gold(INR/10g)	32,303	0.2 %	2.4 %
Gold Comex(USD/oz)	1,280	(0.2) %	(0.9) %
SILVER(INR/1Kg)	38,826	0.3 %	1.5 %
Aluminium(USD/MT)	1,851	(1.4) %	(0.4) %
Copper(USD/MT)	5,885	(0.6) %	0.8 %

FIXED INCOME

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

Global Economy: The European Central Bank (ECB) forecasters trimmed their projections for euro area growth and inflation for this year and next. The real GDP growth projection was lowered to 1.5% from 1.8% for this year, and to 1.5% from 1.6% for 2020. Growth is seen at 1.4% for 2021. Annual HICP inflation is seen averaging 1.5% this year, lower than 1.7 percent seen in the previous survey. The inflation forecast for 2020 was also trimmed to 1.6% from 1.7%. The projected core inflation, which excludes energy, food, alcohol and tobacco, for this year was revised down to 1.3% from 1.4%. The forecast for next year was also cut to 1.5% from 1.7%. Germany's Ifo business confidence indicator dropped fell below 100 for the first time since May 2016, survey results from the Ifo Institute showed on Friday. The Ifo business climate index for Germany dropped to 99.1 from 101 in December. The expectations index of the survey fell to 94.2 from 97.3 in December. The current assessment measure also dropped to 104.3 from 104.9. The seasonally adjusted number of mortgages approved for house purchase by the main high street banks fell to 38,779 in December from 39,205 in November. Gross mortgage lending across the residential market grew around 4.7 percent year-on-year to GBP 21.1 billion in December. In Japan, core consumer prices in Tokyo, a leading indicator of nationwide price trends, rose 1.1% in January from a year earlier, government data showed on Friday.

Global Equities: Sentiments stayed supportive as investors braced for US-China trade talks scheduled for next week.

Indian Economy: Supreme Court has reportedly upheld the constitutional validity of the Insolvency and Bankruptcy Code (IBC). India is continuously focusing on equitable, inclusive growth and on bridging income inequalities. A number of schemes like Jan Dhan Yojana, Saubhagya and Ujjwala stand testament to the core values of inclusiveness that India adheres to', the Vice President of India, Venkaiah Naidu has said.

Equity Markets: Key benchmarks indices ended the volatile session with steep losses. The barometer index, the S&P BSE Sensex, fell 169.56 points or 0.47% to 36,025.54, as per the provisional closing data. The Nifty 50 index fell 74.35 points or 0.69% to 10,775.45, as per the provisional closing data. The Nifty provisionally ended below 10,800 mark. Broader market tumbled. Among secondary barometers, the BSE Mid-Cap index fell 1.20%. The BSE Small-Cap index fell 1.58%.

Corporate News: Lupin said that the USFDA completed the inspection of company's Pithampur Unit-2 (Indore) facility with 6 observations. Emami Ltd has acquired German personal care brand Creme 21 which is large in the Middle-East, according to a company release. Finance Minister Piyush Goyal will meet the CEOs of public sector banks Monday to take a stock of the banking sector, and discuss ways to improve their financial health, according to media reports. Larsen & Toubro has reported strong set of earnings for the quarter ended December 2018 as profit grew by 37% year-on-year to Rs 2,042 crore. Revenue from operations in Q3 increased by 24.2% to Rs 35,708.9 crore on strong execution in project businesses. Maruti Suzuki India's net profit fell 17.2% to Rs 1489.30 crore on 0.1% decline in net sales to Rs 18926.40 crore in Q3 December 2018 over Q3 December 2017. The company sold a total of 428,643 vehicles during the quarter, a decline of 0.6% over the same period the previous year.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(27.3)	(30.5)	(36.2)
MF(INR cr)	354.2	370.2	438.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	38,056	29,870	34,186
F&O(INR cr)	724,057	907,730	963,742

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.9	20.1	16.8
NSE VIX	17.7	16.5	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	27,115	(0.6) %	11.5 %	Energy	14,970	(0.1) %	12.6 %
IT	15,039	0.5 %	18.4 %	Pharma	8,891	(0.0) %	3.1 %
Metals	2,858	(1.2) %	(19.3) %	Finance	11,484	(0.5) %	11.9 %
Auto	8,260	(3.2) %	(25.3) %	PSU	2,951	(1.4) %	3.4 %
FMCG	29,938	(0.3) %	13.0 %	Real Estate	230	(4.4) %	(22.4) %

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>
Bharti Inf	280	6.4 %	(17.1) %	Zee Entert	318	(26.6) %	(45.0) %
Bandhan Ba	424	2.5 %	(10.8) %	DLF	158	(11.1) %	(21.4) %
HCL Techno	969	2.4 %	(1.0) %	Maruti Suz	6,513	(7.5) %	(27.7) %
Yes Bank	220	1.9 %	(28.3) %	UltraTech	3,511	(7.4) %	(11.8) %
Bharti Air	308	1.9 %	(22.2) %	Hero Motoc	2,670	(4.3) %	(26.8) %

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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