



28 Dec.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,780	0.0 %	5.6 %
BSE SENSEX	35,807	0.4 %	7.7 %
CNX BANK	26,879	0.0 %	10.5 %
CNX MIDCAP	17,631	0.0 %	(7.7) %
CNX SMALLCAP	6,329	0.0 %	(20.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,139	1.1 %	(6.8) %
S&P 500	2,489	0.9 %	(7.7) %
FTSE 100	6,585	(1.5) %	(13.9) %
HANG SENG	25,479	(0.7) %	(16.5) %
NIKKEI	20,078	3.9 %	(14.6) %
SHANGHAI COMPOSITE	2,483	(0.6) %	(25.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.36	0.3 %	10.5 %
EUR/USD	1.14	0.3 %	(4.7) %
GBP/USD	1.27	(0.4) %	(6.4) %
USD/JPY	110.74	0.5 %	(1.8) %
USD/AUD	1.42	0.2 %	11.0 %
USD/SGD	1.37	(0.2) %	2.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	7.9 %	(23.4) %
Gold(INR/10g)	31,513	0.2 %	7.3 %
Gold Comex(USD/oz)	1,272	(0.3) %	(2.8) %
SILVER(INR/1Kg)	37,722	1.6 %	(2.3) %
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	0.1 %	0.3 %

Global Economy: The Conference Board said its US consumer confidence index slumped to 128.1 in December after dipping to a revised 136.4 in November. The decrease by the headline index reflected a continued deterioration in consumer expectations, with the expectations index plummeting to 99.1 in December. First-time claims for the US unemployment benefits turned slightly lower in the week ended December 22nd, according to a report released by the Labor Department on Thursday. The report said initial jobless claims slipped to 216,000, a decrease of 1,000 from the previous week's revised level of 217,000. The US holiday retail sales recorded its strongest growth in the last six years, according to data released by Mastercard. According to Mastercard SpendingPulse, which provides insights into overall retail spending trends across all payment types, including cash and check, holiday sales increased 5.1% to more than \$850 billion this year. White House Council of Economic Advisers Chairman Kevin Hassett told reporters that Powell's job is 100 percent safe. China's industrial profits declined in November by 1.8%, witnessing a drop for the first time in nearly three years, reflecting the continued slowdown in the economy due largely to the effects of the trade war with the United States. The latest decline came after industrial profit growth had decelerated in each of the previous seven months, according to data released by the National Statistics Bureau (NBS) on Thursday.

Global Equities: Global stocks turned cautious with the European markets witnessing low-volume trade with many investors away for a long festive break. DOW extended gains though.

Indian Economy: Fiscal deficit of the country in the first eight months of FY2018-19 rose to Rs 7.17 lakh crore, hitting around 115% of the budgeted target for the current financial year, government data showed. The govt had set a fiscal deficit target of Rs 6.24 lakh crore for FY19. According to the data released by the government, between April 2018 to November 2018, receipts stood at Rs 8.96 lakh crore while spendings rose to Rs 16.13 lakh crore during the same period. The Reserve Bank Of India (RBI), stated in a latest update that the reserve money went up by 16.9% over the year to Rs 25.70 lakh crore for the week ended December 21. The central bank also noted that the reserve money fell 2.2% over the week. The currency in circulation jumped 19.6% over the year to Rs 20.29 lakh crore. The government will give out price and demand forecasts for various major foodgrains and price-sensitive horticulture crops.

Equity Markets: Key indices settled with modest gains to close higher for second day in a row. Positive global cues supported gains on the domestic bourses. The Nifty settled below 10,800 mark after opening above that level. The Sensex settled below 36,000 mark after opening above that level. The key indices jumped at opening trades and advanced further. However, the indices came off day's high in morning trade as profit selling emerged at higher levels. The indices firmed up once again in mid-morning trade amid fresh buying support. Benchmarks turned range bound in early afternoon trade. Indices held firm at higher levels in mid-afternoon trade. Indices pared gains in late trade.

Corporate News: Ashoka Buildcon announced the allotment of 1,500 (One Thousand Five Hundred) Un-Secured, Redeemable, Listed, Rated Non-Convertible Debentures (the 'Debentures') of the face value of Rs.10,00,000 aggregating Rs.150 crore on a private placement basis. The Coupon Rate is 9.80% p.a., payable annually. Indian pharmaceutical exports grew 12.2 percent to \$10.8 billion year-on-year (YoY) in the first half of FY19, on generic drug launches, easing of pricing pressure in the key US market and improved regulatory compliance at Indian drug factories, data from Pharmexcil stated, according to media reports. In the first half of FY19 shipments to the US rose 10.3% to \$3.2 billion, while exports to other countries grew 13% to \$7.6 billion. United Bank of India would be in focus as the Central Government is set to invest Rs 2,159 crore in the equity capital of the bank by preferential allotment.





FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(20.6)	16.7	(37.6)
MF(INR cr)	459.8	109.2	447.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,043	31,575	34,713
F&O(INR cr)	2,162,817	1,020,631	975,651

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	30.4	24.2	16.3
NSE VIX	16.1	16.6	15.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,879	(0.4) %	10.5 %	Energy	14,285	1.6 %	7.5 %
IT	14,355	1.4 %	13.0 %	Pharma	8,666	(0.2) %	0.5 %
Metals	3,089	(0.3) %	(12.7) %	Finance	11,459	(0.1) %	11.7 %
Auto	9,184	(0.5) %	(16.9) %	PSU	3,049	(0.4) %	6.8 %
FMCG	30,378	1.3 %	14.6 %	Real Estate	233	(0.6) %	(21.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Lomb	875	5.7 %	11.7 %	Bharat Ele	86	(2.9) %	(40.5) %
Oracle Fin	3,664	2.8 %	(7.0) %	NMDC	92	(2.6) %	(21.7) %
SBI Life I	591	2.7 %	(13.6) %	B H E L	70	(2.2) %	(15.1) %
Marico	377	2.5 %	14.8 %	Tata Motor	91	(2.1) %	(51.9) %
Tech Mahin	709	2.2 %	10.7 %	S A I L	52	(2.0) %	(29.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
KOF Leading Indicator (DEC)	28-12-2018	8:00	CHF	-	99.1
German Consumer Price Index (MoM) (DEC P)	28-12-2018	13:00	EUR	-	0.001
German Consumer Price Index (YoY) (DEC P)	28-12-2018	13:00	EUR	-	0.023
BBA Loans for House Purchase (NOV)	28-12-2018	9:30	GBP	-	39697
Vehicle Production (YoY) (OCT)	28-12-2018	4:00	JPY	-	(0.053)
Advance Goods Trade Balance (NOV)	28-12-2018	13:30	USD	-	-
Retail Inventories (MoM) (NOV)	28-12-2018	13:30	USD	-	0.009
Wholesale Inventories (MoM) (NOV P)	28-12-2018	13:30	USD	-	0.008
Chicago Purchasing Manager (DEC)	28-12-2018	14:45	USD	-	66.4
Pending Home Sales (MoM) (NOV)	28-12-2018	15:00	USD	-	(0.026)
Pending Home Sales (YoY) (NOV)	28-12-2018	15:00	USD	-	(0.046)
EIA Natural Gas Storage Change (DEC 21)	28-12-2018	15:30	USD	-	(141)
EIA Working Natural Gas Implied Flow (DEC 21)	28-12-2018	15:30	USD	-	(141)
DOE Cushing OK Crude Inventory (DEC 21)	28-12-2018	16:00	USD	-	-
DOE U.S. Crude Oil Inventories (DEC 21)	28-12-2018	16:00	USD	-	-
DOE U.S. Distillate Inventory (DEC 21)	28-12-2018	16:00	USD	-	-
DOE U.S. Gasoline Inventories (DEC 21)	28-12-2018	16:00	USD	-	-
Baker Hughes U.S. Rig Count (DEC 28)	28-12-2018	18:00	USD	-	1080

..... End of Report

