



29 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,654	(0.1) %	4.3 %
BSE SENSEX	35,657	(1.0) %	7.4 %
CNX BANK	26,616	(0.1) %	9.4 %
CNX MIDCAP	16,597	(0.4) %	(13.1) %
CNX SMALLCAP	6,034	(0.3) %	(23.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,528	(0.8) %	5.1 %
S&P 500	2,644	(0.8) %	5.5 %
FTSE 100	6,747	(0.9) %	0.2 %
HANG SENG	27,577	0.0 %	9.7 %
NIKKEI	20,649	(0.6) %	5.6 %
SHANGHAI COMPOSITE	2,597	(0.2) %	5.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.11	0.0 %	2.4 %
EUR/USD	1.14	0.9 %	(0.2) %
GBP/USD	1.31	0.2 %	3.1 %
USD/JPY	109.23	(0.4) %	(0.4) %
USD/AUD	1.40	(0.6) %	(1.5) %
USD/SGD	1.35	(0.4) %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(3.2) %	11.7 %
Gold(INR/10g)	32,691	1.2 %	3.7 %
Gold Comex(USD/oz)	1,303	0.1 %	1.0 %
SILVER(INR/1Kg)	39,742	2.4 %	3.9 %
Aluminium(USD/MT)	1,860	(0.3) %	0.1 %
Copper(USD/MT)	5,996	1.6 %	2.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	(0.0) %	0.1 %

Global Economy: The Federal Reserve of Chicago's national activity index rose to 0.27 in December, up from 0.21 in November. Growth in Texas manufacturing activity accelerating in January, according to the Federal Reserve Bank of Dallas. It's monthly manufacturing index rose from 7.3 to 14.5. Chinese industrial profits fell for the second consecutive month in December, adding to the latest wave of tepid economic data. The country's industrial profits declined 1.9% in December from a year earlier, National Bureau of Statistics data showed. The fall marked the second-straight monthly decline after November saw the first negative reading since December 2015. For the full year, industrial profits rose around 10.3% year on year in 2018. Eurozone lending growth maintained its momentum in December, while a measure of broad money rose at the fastest pace in six months, figures from the European Central Bank showed on Monday. Lending to households rose 3.3% year-on-year in December, same as in November. Loans to non-financial corporations increased 4% annually in December, also unchanged from November. The broad money aggregate M3 grew 4.1% year-on-year after a 3.7% rise in November.

Global Equities: US stocks closed lower Monday in the wake of disappointing earnings and Nvidia Corp. Investors turned cautious at the start of a busy week packed with earnings, economic data, a Federal Reserve meeting and a new round of US-China trade talks.

Indian Economy: The rabi sowing area continued to lag behind last year. As compared to 622.12 lakh hectares (lh) planted during the corresponding period, the sowing covered only 591.64 lh till 25th January 2019, according to data released by the Agriculture Ministry. This accounted for a drop of around 4.90%. Wheat acreage is down 2.5% to 296.37 lh while Rice has been sown onto 18.06 lh, down by a sharp 21%. Acreage under coarse cereals is at 47.02 lh, down nearly 14%. The acreage under pulses is at 151.10 lh, down 6.10%. Prime Minister Narendra Modi stated that Pradhan Mantri Ujjwala Yojana has brought cheers to many and nearly six crore LPG connections have reached to the households of the poorest of the poor since May 2016.

Equity Markets: Domestic stocks dropped sharply led by slide in ICICI Bank, Reliance Industries and ITC. The Sensex settled below 36,000 mark while the Nifty fell below 10,700 mark. Negative global cues spoiled investors' sentiment. Key benchmark indices extended fall and hit fresh intraday low in mid-afternoon trade. Stocks cut losses in late trade. The Sensex fell 368.84 points or 1.02% to settle at 35,656.70, its lowest closing level since 3 January 2019. The Nifty 50 index fell 119 points or 1.10% to settle at 10,661.55, its lowest closing level since 11 December 2018.

Corporate News: Persistent Systems' net profit rose 4.06% to Rs 91.72 crore on 3.43% increase in net sales to Rs 864.25 crore in Q3 December 2018 over Q2 September 2018. Syndicate Bank said it has determined Rs 37.75 per equity share as the issue price for preferential issue of shares, aggregating to Rs 1632 crore to Government of India, the promoters. At the above issue price, bank can allot upto 43.23 crore equity shares to Government of India against capital infusion of Rs 1632 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	103.4	(23.5)	(35.5)
MF(INR cr)	55.4	353.8	436.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,488	30,301	34,207
F&O(INR cr)	898,683	907,278	963,425

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.9	19.9	16.8
NSE VIX	18.9	16.6	15.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,653	(1.7) %	9.6 %	Energy	14,820	(1.0) %	11.5 %
IT	15,120	0.5 %	19.0 %	Pharma	8,664	(2.6) %	0.5 %
Metals	2,827	(1.1) %	(20.1) %	Finance	11,267	(1.9) %	9.8 %
Auto	8,143	(1.4) %	(26.4) %	PSU	2,904	(1.6) %	1.7 %
FMCG	29,566	(1.2) %	11.6 %	Real Estate	229	(0.3) %	(22.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	373	17.2 %	(35.5) %	Adani Port	326	(12.8) %	(11.8) %
Sun TV Net	532	5.2 %	(38.1) %	Indiabulls	699	(6.1) %	(43.8) %
DLF	164	3.8 %	(18.4) %	Shriram Tr	1,056	(5.8) %	(28.1) %
Bharti Inf	287	2.7 %	(14.9) %	Piramal En	2,171	(5.6) %	(12.2) %
HDFC Life	367	2.2 %	(23.9) %	Yes Bank	208	(5.5) %	(32.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Conditions (DEC)	29-01-2019	0:30	AUD	-	11
NAB Business Confidence (DEC)	29-01-2019	0:30	AUD	-	3
ANZ Roy Morgan Weekly Consumer Confidence Index (JAN 27)	29-01-2019	22:30	AUD	-	115.7
Exports (MoM) (DEC)	29-01-2019	7:00	CHF	-	0.01
Imports (MoM) (DEC)	29-01-2019	7:00	CHF	-	(0.015)
Swiss Watch Exports (YoY) (DEC)	29-01-2019	7:00	CHF	-	0.039
ECB's Villeroy speaks in Paris	29-01-2019	10:20	EUR	-	-
BOE's Woods Speaks on Financial Regulation	29-01-2019	9:15	GBP	-	-
Large Retailers' Sales (DEC)	29-01-2019	23:50	JPY	-	(0.022)
Retail Trade (YoY) (DEC)	29-01-2019	23:50	JPY	-	0.014
Retail Trade s.a. (MoM) (DEC P)	29-01-2019	23:50	JPY	-	(0.01)
Cap Goods Orders Nondef Ex Air (DEC P)	29-01-2019	0:00	USD	-	-
Cap Goods Ship Nondef Ex Air (DEC P)	29-01-2019	0:00	USD	-	-
Durable Goods Orders (DEC P)	29-01-2019	0:00	USD	-	-
Durables Ex Transportation (DEC P)	29-01-2019	0:00	USD	-	-
New Home Sales (DEC)	29-01-2019	0:00	USD	-	-
New Home Sales (MoM) (DEC)	29-01-2019	0:00	USD	-	-
Wholesale Inventories (MoM) (NOV F)	29-01-2019	0:00	USD	-	-
Wholesale Trade Sales (MoM) (NOV)	29-01-2019	0:00	USD	-	(0.002)
Advance Goods Trade Balance (DEC)	29-01-2019	13:30	USD	-	-
Retail Inventories (MoM) (DEC)	29-01-2019	13:30	USD	-	-
Wholesale Inventories (MoM) (DEC P)	29-01-2019	13:30	USD	-	-
S&P CoreLogic CS 20-City (MoM) SA (NOV)	29-01-2019	14:00	USD	-	0.0041
S&P/Case-Shiller 20-City Index n.s.a (NOV)	29-01-2019	14:00	USD	-	213.89
S&P/Case-Shiller Composite-20 (YoY) (NOV)	29-01-2019	14:00	USD	-	0.0503
S&P/Case-Shiller US Home Price Index (NOV)	29-01-2019	14:00	USD	-	206.03
S&P/Case-Shiller US Home Price Index (YoY) (NOV)	29-01-2019	14:00	USD	-	0.0548
Conf. Board Expectations (JAN)	29-01-2019	15:00	USD	-	99.1
Conf. Board Present Situation (JAN)	29-01-2019	15:00	USD	-	171.6



Consumer Confidence Index (JAN)	29-01-2019	15:00	USD	-	128.1
U.S. to Sell USD20 Bln 2-Year Floating Rate Notes	29-01-2019	16:30	USD	-	-
U.S. to Sell USD26 Bln 52-Week Bills	29-01-2019	16:30	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	29-01-2019	18:00	USD	-	-

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