



30 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,702	0.5 %	4.8 %
BSE SENSEX	35,593	(0.2) %	7.5 %
CNX BANK	26,790	0.8 %	10.1 %
CNX MIDCAP	16,766	0.4 %	(12.2) %
CNX SMALLCAP	6,084	0.4 %	(23.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,580	0.2 %	5.4 %
S&P 500	2,640	(0.2) %	5.3 %
FTSE 100	6,834	1.3 %	1.5 %
HANG SENG	27,532	(0.2) %	9.6 %
NIKKEI	20,665	0.1 %	5.6 %
SHANGHAI COMPOSITE	2,594	(0.1) %	5.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.11	(0.1) %	2.4 %
EUR/USD	1.14	0.3 %	(0.1) %
GBP/USD	1.31	(0.8) %	2.7 %
USD/JPY	109.27	(0.3) %	(0.3) %
USD/AUD	1.39	0.0 %	(2.0) %
USD/SGD	1.35	(0.1) %	(1.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	2.5 %	14.5 %
Gold(INR/10g)	32,862	0.5 %	4.2 %
Gold Comex(USD/oz)	1,313	0.7 %	1.7 %
SILVER(INR/1Kg)	39,964	0.6 %	4.4 %
Aluminium(USD/MT)	1,853	(0.4) %	(0.3) %
Copper(USD/MT)	6,007	0.2 %	2.9 %

FIXED INCOME

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

Global Economy: The US Conference Board said its consumer confidence index fell to 120.2 in January after tumbling to a revised 126.6 in December. Global crude steel production hit 1,808.6 MT for the year 2018 from 1,729.8 MT in 2017, marking a rise of 4.6%, according to World Steel Association (worldsteel). China's crude steel output spiked 6.6% to 928.3 million tonnes (MT) in 2018 from 870.9 MT in 2017. Spain's employment grew at a faster annual pace in the fourth quarter of 2018, preliminary data from the statistical office INE showed on Tuesday. Employment rose by 2.98%, or 566,200 persons, year-on-year in the fourth quarter, after rising 2.51% in the previous three months. Italy's producer price inflation slowed for the second straight month in December to its lowest level in six months, data from the statistical office Istat showed. Producer prices rose 4.1% year-on-year in December after a 4.5% increase in November.

Global Equities: Prospects for a long-awaited US-China trade deal dealt another blow as US announced a set of indictments against Huawei ahead of trade talks with China.

Indian Economy: Government of India has announced the sale of five dated securities for Rs 12,000 crore. These securities include 7.00% GS 2021 (Rs 2,000), 8.24% GS 2027 (Rs 2,000), GOI FRB 2031 (Rs 3,000), 7.40% GS 2035 (Rs 2,000), 8.17% GS 2044 (3,000). Subject to the limit of Rs 12000 Cr, being total notified amount, GoI will have the option to retain additional subscription up to Rs 1000 Cr each against any one or more of the above security. India Inc is expected to raise their hiring budgets by 34 percent and volumes by 31% in 2019 according to Mercer-Mettl's 2nd Annual 'State of Talent Acquisition 2019'. The average hiring volumes are expected to rise by 31% in 2019, compared to 25% last year.

Equity Markets: Key indices ended with modest losses after a volatile session of trade. Selling in Reliance Industries, HDFC twins and L&T put pressure on bourses. Firmness in ITC, TCS and ICICI Bank supported bourses are lower levels. The Sensex fell 64.20 points or 0.18% to settle at 35,592.50, its lowest closing level since 3 January 2019. The Nifty 50 index fell 9.35 points or 0.09% to settle at 10,652.20, its lowest closing level since 11 December 2018.

Corporate News: Bajaj Finance said that its consolidated net profit rose 54% to Rs 1060 crore on 48% increase in total income to Rs 4995 crore in Q3 December 2018 over Q3 December 2017. HDFC net profit fell 60.12% to Rs 2113.80 crore on 19.77% increase in total income to Rs 10569.12 crore in Q3 December 2018 over Q3 December 2017. Mahindra & Mahindra (M&M) announced the commercial launch of the FURIO, its brand-new range of Intermediate Commercial Vehicles (ICVs) with an unprecedented guarantee of More Profit or Truck Back.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(10.8)	(22.9)	(35.4)
MF(INR cr)	102.6	341.3	434.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,511	30,596	34,218
F&O(INR cr)	855,504	904,813	962,901

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.1	19.8	16.8
NSE VIX	18.4	16.7	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,573	(0.3) %	9.2 %	Energy	14,631	(1.3) %	10.1 %
IT	15,231	0.7 %	19.9 %	Pharma	8,757	1.1 %	1.6 %
Metals	2,828	0.0 %	(20.1) %	Finance	11,225	(0.4) %	9.4 %
Auto	8,120	(0.3) %	(26.6) %	PSU	2,920	0.6 %	2.3 %
FMCG	29,759	0.7 %	12.3 %	Real Estate	228	(0.5) %	(23.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Adani Port	349	7.1 %	(5.5) %	Eicher Mot	18,877	(5.6) %	(33.3) %
Bank of Ba	114	4.2 %	(19.8) %	Cadila Hea	322	(3.8) %	(16.5) %
Bharti Inf	297	3.5 %	(11.9) %	GAIL (Indi	324	(2.9) %	(0.4) %
Hind.Zinc	260	3.4 %	(14.4) %	Shriram Tr	1,027	(2.8) %	(30.1) %
Bajaj Fins	6,233	3.0 %	18.3 %	Yes Bank	203	(2.2) %	(33.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Prices Index (QoQ) (4Q)	30-01-2019	0:30	AUD	-	0.004
Consumer Prices Index (YoY) (4Q)	30-01-2019	0:30	AUD	-	0.019
Consumer Prices Index RBA Trimmed Mean (QoQ) (4Q)	30-01-2019	0:30	AUD	-	0.004
Consumer Prices Index RBA Trimmed Mean (YoY) (4Q)	30-01-2019	0:30	AUD	-	0.018
Consumer Prices Index RBA Weighted Median (QoQ) (4Q)	30-01-2019	0:30	AUD	-	0.003
Consumer Prices Index RBA Weighted Median (YoY) (4Q)	30-01-2019	0:30	AUD	-	0.017
KOF Leading Indicator (JAN)	30-01-2019	8:00	CHF	-	96.3
Credit Suisse Survey Expectations (JAN)	30-01-2019	9:00	CHF	-	(22.2)
Euro-Zone Business Climate Indicator (JAN)	30-01-2019	10:00	EUR	-	0.82
Euro-Zone Consumer Confidence (JAN F)	30-01-2019	10:00	EUR	-	(7.9)
Euro-Zone Economic Confidence (JAN)	30-01-2019	10:00	EUR	-	107.3
Euro-Zone Industrial Confidence (JAN)	30-01-2019	10:00	EUR	-	1.1
Euro-Zone Services Confidence (JAN)	30-01-2019	10:00	EUR	-	12
German Consumer Price Index (MoM) (JAN P)	30-01-2019	13:00	EUR	-	0.001
German Consumer Price Index (YoY) (JAN P)	30-01-2019	13:00	EUR	-	0.017
French Gross Domestic Product (QoQ) (4Q A)	30-01-2019	6:30	EUR	-	0.003
French Gross Domestic Product (YoY) (4Q A)	30-01-2019	6:30	EUR	-	0.014
German GfK Consumer Confidence (FEB)	30-01-2019	7:00	EUR	-	10.4
German Import Price Index (MoM) (DEC)	30-01-2019	7:00	EUR	-	(0.01)
German Import Price Index (YoY) (DEC)	30-01-2019	7:00	EUR	-	0.031
BRC Shop Price Index (YoY) (JAN)	30-01-2019	0:01	GBP	-	0.003
M4 Ex IOFCs 3M Annualised (DEC)	30-01-2019	9:30	GBP	-	0.017
M4 Money Supply (YoY) (DEC)	30-01-2019	9:30	GBP	-	0.008
Money Supply M4 (MoM) (DEC)	30-01-2019	9:30	GBP	-	0
Mortgage Approvals (DEC)	30-01-2019	9:30	GBP	-	-
Net Consumer Credit (DEC)	30-01-2019	9:30	GBP	-	-
Net Lending Sec. on Dwellings (DEC)	30-01-2019	9:30	GBP	-	-
BOJ Outright Bond Purchase 5~10 Years	30-01-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 1~5 Years	30-01-2019	2:50	JPY	-	-



Foreign Buying Japan Bonds (JAN 25)	30-01-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JAN 25)	30-01-2019	23:50	JPY	-	-
Industrial Production (MoM) (DEC P)	30-01-2019	23:50	JPY	-	(0.01)
Industrial Production (YoY) (DEC P)	30-01-2019	23:50	JPY	-	0.015
Japan Buying Foreign Bonds (Yen) (JAN 25)	30-01-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JAN 25)	30-01-2019	23:50	JPY	-	-
Loans & Discounts Corp (YoY) (DEC)	30-01-2019	23:50	JPY	-	0.0366
Consumer Confidence Index (JAN)	30-01-2019	5:00	JPY	-	42.7
Gross Domestic Product NSA (YoY) (4Q P)	30-01-2019	14:00	MXN	-	0.025
Gross Domestic Product SA (QoQ) (4Q P)	30-01-2019	14:00	MXN	-	0.008
MBA Mortgage Applications (JAN 25)	30-01-2019	12:00	USD	-	(0.027)
ADP Employment Change (JAN)	30-01-2019	13:15	USD	-	-
Core PCE (QoQ) (4Q A)	30-01-2019	13:30	USD	-	0.016
Gross Domestic Product Annualized (QoQ) (4Q A)	30-01-2019	13:30	USD	-	0.034
Gross Domestic Product Price Index (4Q A)	30-01-2019	13:30	USD	-	0.018
Personal Consumption (4Q A)	30-01-2019	13:30	USD	-	0.035
Pending Home Sales (MoM) (DEC)	30-01-2019	15:00	USD	-	(0.007)
Pending Home Sales (YoY) (DEC)	30-01-2019	15:00	USD	-	(0.077)
DOE Cushing OK Crude Inventory (JAN 25)	30-01-2019	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 25)	30-01-2019	15:30	USD	-	-
DOE U.S. Distillate Inventory (JAN 25)	30-01-2019	15:30	USD	-	-
DOE U.S. Gasoline Inventories (JAN 25)	30-01-2019	15:30	USD	-	-
FOMC Rate Decision (Lower Bound) (JAN 30)	30-01-2019	19:00	USD	-	0.0225
FOMC Rate Decision (Upper Bound) (JAN 30)	30-01-2019	19:00	USD	-	0.025
Interest Rate on Excess Reserves (JAN 31)	30-01-2019	19:00	USD	-	0.024
Fed Chairman Powell Holds Post-FOMC Press Conference	30-01-2019	19:30	USD	-	-

..... End of Report

