



31 Jan.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,745	0.9 %	5.2 %
BSE SENSEX	35,591	(0.0) %	8.1 %
CNX BANK	27,022	0.7 %	11.1 %
CNX MIDCAP	16,771	(0.1) %	(12.2) %
CNX SMALLCAP	6,110	0.2 %	(22.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,015	1.8 %	7.2 %
S&P 500	2,681	1.6 %	6.9 %
FTSE 100	6,942	1.6 %	3.1 %
HANG SENG	27,643	0.4 %	10.0 %
NIKKEI	20,557	(0.5) %	5.1 %
SHANGHAI COMPOSITE	2,576	(0.7) %	4.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.13	0.0 %	2.4 %
EUR/USD	1.15	0.5 %	0.4 %
GBP/USD	1.31	0.2 %	2.9 %
USD/JPY	108.90	(0.3) %	(0.7) %
USD/AUD	1.38	(1.1) %	(3.0) %
USD/SGD	1.35	(0.4) %	(1.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	2.5 %	14.5 %
Gold(INR/10g)	33,000	0.4 %	4.7 %
Gold Comex(USD/oz)	1,318	0.4 %	2.1 %
SILVER(INR/1Kg)	40,051	0.2 %	4.7 %
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: Following its decision to keep interest rates steady after a two-day meeting, the Federal Open Market Committee said in a statement that the Committee will be patient as it determines what future adjustments to the target range for the federal funds rate may be appropriate. Eurozone's economic sentiment weakened for a seventh month in a row to its lowest level in over two years, survey data from the European Commission showed on Wednesday. The economic sentiment indicator dropped to 106.2 from December's 107.4. Germany's consumer confidence is set to improve in February, defying expectations for a modest easing, survey data from the GfK showed. The forward-looking GfK consumer confidence indicator for February rose to 10.8 from a revised 10.5 in January. Income expectations and propensity to buy improved further, while households assessed the general economic outlook less optimistically for a fourth straight month. The number of mortgage approvals in UK was 63,793 in December 2018, which was the lowest since April 2018. France's economic growth remained steady in the fourth quarter of 2018. Gross domestic product grew 0.3% quarter-on-quarter, same as in the third quarter. Japan retail sales were up a seasonally adjusted 0.9% on month in December, following the downwardly revised 1.1% drop in November. On a yearly basis, retail sales rose 1.3%- following the 1.4% gain in the previous month.

Global Equities: Sentiments were supported on the dovish outcome of Federal Reserve meeting.

Indian Economy: India's Technical Textiles are estimated to grow to Rs. 2 lakh crore by 2020-21 noted the Union Textiles Minister Smriti Irani. Under the aegis of Ministry of Textiles, for the first time in the history of India, the government has dedicated to the nation 207 HSN codes for technical textiles. This decision alone can enable the sector to grow at a massive pace in coming years. The RBI noted that it has been monitoring the evolving liquidity conditions and durable liquidity requirements of the system. Accordingly, it has been decided to conduct purchase of Government securities under Open Market Operations (OMOs) for an aggregate amount of Rs 375 billion in the month of February 2019 through three auctions of Rs 125 billion each during the 2nd, 3rd and 4th week. The Total Horticulture production of the country is estimated to be 314.5 Million Tonnes during 2018-19 (First Adv. Est) which would be 0.95% higher than the 2017-18 and 8% higher than the past 5 years' average production. Onion production in current year is likely to be around 23.62 Million Tonnes as against 23.26 Million Tonnes in 2017-18 (1.5% higher).

Equity Markets: Key equity indices ended flat after alternately swinging between positive and negative zone throughout the trading session. Broader market outperformed. The S&P BSE Mid-Cap index rose 0.22%. The S&P BSE Small-Cap index rose 0.78%.

Corporate News: ICICI Bank's net profit fell 2.75% to Rs 1,604.91 crore on 19.79% increase in total income to Rs 20,163.25 crore in Q3 December 2018 over Q3 December 2017. NTPC's net profit rose 1% to Rs 2385.41 crore on 16.1% increase in net sales to Rs 24,120.36 crore in Q3 December 2018 over Q3 December 2017. Bharti Airtel, Dabur India, Hero MotoCorp, NMDC, Power Grid Corporation of India, UPL and Vedanta will announce October-December 2018 quarterly results today, 31 January 2019.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(38.9)	(23.6)	(35.4)
MF(INR cr)	373.4	351.0	435.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,663	30,918	34,235
F&O(INR cr)	1,119,139	914,555	963,656

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.7	19.7	16.8
NSE VIX	17.9	16.7	15.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,826	0.9 %	10.3 %	Energy	14,479	(1.0) %	8.9 %
IT	15,255	0.2 %	20.1 %	Pharma	8,735	(0.3) %	1.3 %
Metals	2,882	1.9 %	(18.6) %	Finance	11,275	0.4 %	9.9 %
Auto	8,118	(0.0) %	(26.6) %	PSU	2,976	1.9 %	4.3 %
FMCG	29,464	(1.0) %	11.2 %	Real Estate	227	(0.7) %	(23.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Bank	366	5.5 %	39.7 %	Godrej Con	694	(7.7) %	(6.7) %
Tata Steel	467	5.3 %	(19.2) %	LIC Housin	434	(4.2) %	(19.6) %
Axis Bank	691	4.6 %	38.5 %	Indiabulls	673	(3.7) %	(45.9) %
NMDC	96	4.4 %	(18.5) %	Adani Port	338	(3.2) %	(8.5) %
Bajaj Fin.	2,596	3.2 %	42.7 %	Bajaj Auto	2,500	(2.6) %	(11.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Export Price Index (QoQ) (4Q)	31-01-2019	0:30	AUD	-	0.037
Import price Index (QoQ) (4Q)	31-01-2019	0:30	AUD	-	0.019
Private Sector Credit (MoM) (DEC)	31-01-2019	0:30	AUD	-	0.003
Private Sector Credit (YoY) (DEC)	31-01-2019	0:30	AUD	-	0.044
AiG Performance of Manufacturing Index (JAN)	31-01-2019	21:30	AUD	-	49.5
CBA Australia PMI Mfg (JAN F)	31-01-2019	22:00	AUD	-	54.3
CoreLogic House Px (MoM) (JAN)	31-01-2019	23:00	AUD	-	(0.013)
Gross Domestic Product (MoM) (NOV)	31-01-2019	13:30	CAD	-	0.003
Gross Domestic Product (YoY) (NOV)	31-01-2019	13:30	CAD	-	0.022
Industrial Product Price (MoM) (DEC)	31-01-2019	13:30	CAD	-	(0.008)
Raw Materials Price Index (MoM) (DEC)	31-01-2019	13:30	CAD	-	(0.117)
CFIB Business Barometer (JAN)	31-01-2019	15:00	CAD	-	53.6
Speech by Wilkins, Bank of Canada Senior Deputy Governor	31-01-2019	17:45	CAD	-	-
Composite PMI (JAN)	31-01-2019	1:00	CNY	-	52.6
Manufacturing PMI (JAN)	31-01-2019	1:00	CNY	-	49.4
Non-manufacturing PMI (JAN)	31-01-2019	1:00	CNY	-	53.8
Euro-Zone Gross Domestic Product s.a. (QoQ) (4Q A)	31-01-2019	10:00	EUR	-	0.002
Euro-Zone Gross Domestic Product s.a. (YoY) (4Q A)	31-01-2019	10:00	EUR	-	0.016
Euro-Zone Unemployment Rate (DEC)	31-01-2019	10:00	EUR	-	0.079
Italian Gross Domestic Product w.d.a. (QoQ) (4Q P)	31-01-2019	10:00	EUR	-	(0.001)
Italian Gross Domestic Product w.d.a. (YoY) (4Q P)	31-01-2019	10:00	EUR	-	0.007
ECB's Mersch Speaks in Luxembourg	31-01-2019	10:15	EUR	-	-
ECB's Weidmann Speaks in Mannheim, Germany	31-01-2019	16:00	EUR	-	-
German Retail Sales (MoM) (DEC)	31-01-2019	7:00	EUR	-	0.014
German Retail Sales (YoY) (DEC)	31-01-2019	7:00	EUR	-	0.011
ECB's Coeure Speaks in Cape Town	31-01-2019	8:00	EUR	-	-
German Unemployment Change (000's) (JAN)	31-01-2019	8:55	EUR	-	-
German Unemployment Claims Rate s.a. (JAN)	31-01-2019	8:55	EUR	-	0.05
CFR Consumer Confidence (JAN)	31-01-2019	0:01	GBP	-	(1.1)



Lloyds Business Barometer (JAN)	31-01-2019	0:01	GBP	-	17
Nationwide House PX (MoM) (JAN)	31-01-2019	7:00	GBP	-	(0.007)
Nationwide House Px n.s.a. (YoY) (JAN)	31-01-2019	7:00	GBP	-	0.005
BOJ Deputy Governor Amamiya makes a speech	31-01-2019	1:30	JPY	-	-
Jobless Rate (DEC)	31-01-2019	23:30	JPY	-	0.025
Job-To-Applciant Ratio (DEC)	31-01-2019	23:30	JPY	-	1.63
Vehicle Production (YoY) (DEC)	31-01-2019	4:00	JPY	-	0.063
PM Abe and ex-BOJ Deputy Governor Nakaso speak at Daiwa's conf	31-01-2019	4:05	JPY	-	-
Annualized Housing Starts (DEC)	31-01-2019	5:00	JPY	-	-
Construction Orders (YoY) (DEC)	31-01-2019	5:00	JPY	-	(0.107)
Housing Starts (YoY) (DEC)	31-01-2019	5:00	JPY	-	(0.006)
ANZ Consumer Confidence (MoM) (JAN)	31-01-2019	21:00	NZD	-	0.028
ANZ Consumer Confidence Index (JAN)	31-01-2019	21:00	NZD	-	121.9
Challenger Job Cuts (YoY) (JAN)	31-01-2019	12:30	USD	-	0.353
Continuing Claims (JAN 19)	31-01-2019	13:30	USD	-	-
Employment Cost Index (4Q)	31-01-2019	13:30	USD	-	0.008
Initial Jobless Claims (JAN 26)	31-01-2019	13:30	USD	-	-
PCE Core (MoM) (DEC)	31-01-2019	13:30	USD	-	0.001
PCE Core (YoY) (DEC)	31-01-2019	13:30	USD	-	0.019
PCE Deflator (MoM) (DEC)	31-01-2019	13:30	USD	-	0.001
Personal Consumption Expenditure Deflator (YoY) (DEC)	31-01-2019	13:30	USD	-	0.018
Personal Income (DEC)	31-01-2019	13:30	USD	-	0.002
Personal Spending (DEC)	31-01-2019	13:30	USD	-	0.004
Real Personal Spending (DEC)	31-01-2019	13:30	USD	-	0.003
Chicago Purchasing Manager (JAN)	31-01-2019	14:45	USD	-	63.8
EIA Natural Gas Storage Change (JAN 25)	31-01-2019	15:30	USD	-	(163)
EIA Working Natural Gas Implied Flow (JAN 25)	31-01-2019	15:30	USD	-	(163)
U.S. to Sell 4-Week Bills	31-01-2019	16:30	USD	-	-
U.S. to Sell 8-Week Bills	31-01-2019	16:30	USD	-	-

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