



31 Dec.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,913	0.5 %	6.9 %
BSE SENSEX	36,077	0.8 %	9.0 %
CNX BANK	27,268	0.5 %	12.1 %
CNX MIDCAP	17,879	0.5 %	(6.4) %
CNX SMALLCAP	6,424	0.4 %	(19.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,062	(0.3) %	(7.1) %
S&P 500	2,486	(0.1) %	(7.8) %
FTSE 100	6,734	2.3 %	(12.0) %
HANG SENG	25,504	0.1 %	(16.4) %
NIKKEI	20,015	(0.3) %	(14.9) %
SHANGHAI COMPOSITE	2,494	0.4 %	(25.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.93	(0.6) %	9.8 %
EUR/USD	1.14	(0.0) %	(4.7) %
GBP/USD	1.27	0.3 %	(6.0) %
USD/JPY	110.27	(0.4) %	(2.2) %
USD/AUD	1.42	(0.0) %	11.0 %
USD/SGD	1.37	(0.3) %	2.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	1.6 %	(24.9) %
Gold(INR/10g)	31,547	0.1 %	7.5 %
Gold Comex(USD/oz)	1,283	0.3 %	(1.9) %
SILVER(INR/1Kg)	38,133	1.1 %	(1.2) %
Aluminium(USD/MT)	1,881	(0.9) %	(16.6) %
Copper(USD/MT)	6,018	0.5 %	(16.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	(0.1) %	0.3 %

Global Economy: The MNI Indicators said its Chicago business barometer dropped to 65.4 in December after spiking to 66.4 in November, with a reading above 50 still indicating growth in regional business activity. A slowdown in the pace of growth in demand contributed to the modest drop by the barometer, as the new orders index fell in December after surging in November. The NAR said its pending home sales index fell by 0.7% to 101.4 in November after plummeting by 2.6% to 102.1 in October. global economy is set to slow down in 2019 and stabilise thereafter, the European Central Bank stated in a latest update. Looking ahead, global economic activity is expected to decelerate in 2019 and remain steady thereafter, the ECB said in its regular economic bulletin. Global inflationary pressures are expected to rise slowly as spare capacity diminishes, it noted. House price inflation in the UK as measured by a 20-city index is registering house price inflation of 2.6%, the lowest annual rate of growth for 5 years, primarily because of correction in London and other southern cities according to Hometrack. House price inflation in London is ending the year with price falls for only the second time in 23 years. Affordability will set the framework for future growth, and the consultancy predicts 2% house price growth in 2019. Japan industrial production fell a seasonally adjusted 1.1% on month in November, the Ministry of Economy and Industry said in Friday's preliminary report, following the 2.9% jump in October. On a yearly basis, industrial production advanced 1.4%, after climbing 4.2% in the previous month. Russia's manufacturing sector expanded at as lower rate in November, but the pace of growth remained robust, survey data from IHS Markit showed Friday. The Purchasing Managers' Index, or PMI, dropped to 51.7 from 52.6 in November.

Global Equities: US stocks took a breather following the substantial volatility seen over the past several sessions. DOW saw a modest drop on profit selling pressure.

Indian Equities: Domestic banks have requested the Insolvency and Bankruptcy Board of India (IBBI) to introduce deterrent provisions in IBC rules. The banks have suggested that bidders should be asked to cough up 0.5-1% of the loan owed by a company undergoing resolution as a deposit with the National Company Law Appellate Tribunal (NCLAT) each time they go on appeal. India should cut down its dependence on imports for special steel products by encouraging the domestic manufacturing of such products, noted a latest update from the Ministry of Steel. The water storage available in 91 major reservoirs of the country for the week ending on December 27, 2018 was 86.373 BCM, which is 53% of total storage capacity of these reservoirs. This percentage was at 55% for the week ending on December 20, 2018. The government has revised the Minimum Support Price (MSP) of 23 items of Minor Forest Produce (MFP) items and has introduced MSP for 17 new MFP items.

Equity Markets: The local stocks rose for third straight trading session, backed by positive global cues. Buying was witnessed across all sectors, with banks shares in the lead. The Sensex reclaimed the 36,000-mark after opening below that level. The Sensex rose 269.44 points or 0.75% to settle at 36,076.72, its highest closing level since 20 December 2018. The Nifty 50 index rose 80.10 points or 0.74% to settle at 10,859.90, its highest closing level since 20 December 2018. Key indices started Friday's session on a positive note tracking firm global cues. Indices extended gains as the session progressed and hit fresh intraday high in morning trade.

Corporate News: Reliance Industries (RIL) said its wholly-owned subsidiary, Reliance Industrial Investments and Holdings ('RIIHL'), has entered into a binding agreement with Kanoda Energy Systems ('KESL') for acquisition of equity shares for a cash consideration not exceeding Rs 75 crore. The said investment upon completion will translate into 88% equity stake in KESL on a fully diluted basis. The total investment is likely to be completed by March 2020. Cadila Healthcare will be watched. Zydus Cadila has received the final approval from the US Food and Drug Administration (USFDA) to market Clindamycin Phosphate and Benzoyl Peroxide Gel, (US RLD - DUAC Gel), 1.2%/5%. It will be manufactured at the



group's Topical manufacturing facility at Ahmedabad. The Indian rupee strengthened further against the US dollar on Friday, tracking gains in its Asian peers as a government shutdown in the US weighs on the dollar. The INR broke under 70 per dollar mark and ended at 69.95 as against the Thursday's close of 70.36. This can weigh on the local IT counters.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	224.3	28.3	(36.2)
MF(INR cr)	(1,537.2)	17.8	436.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	27,718	31,372	34,675
F&O(INR cr)	400,247	987,980	972,524

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.3	24.7	16.4
NSE VIX	15.3	16.6	15.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,125	0.9 %	11.5 %	Energy	14,370	0.6 %	8.1 %
IT	14,386	0.2 %	13.2 %	Pharma	8,814	1.7 %	2.2 %
Metals	3,112	0.8 %	(12.1) %	Finance	11,586	1.1 %	12.9 %
Auto	9,224	0.4 %	(16.6) %	PSU	3,080	1.0 %	7.9 %
FMCG	30,544	0.5 %	15.3 %	Real Estate	233	0.3 %	(21.3) %

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>
SAIL	55	6.1 %	(25.2) %	Coal India	242	(3.2) %	(12.7) %
Avenue Sup	1,655	5.4 %	21.9 %	ICICI Lomb	851	(2.8) %	8.5 %
Sun TV Net	615	5.0 %	(28.5) %	General In	256	(1.7) %	(30.9) %
Oil India	178	4.1 %	(21.7) %	Bharti Inf	263	(1.4) %	(22.1) %
Titan Comp	923	3.9 %	(2.3) %	Pidilite I	1,102	(1.1) %	17.1 %

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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