

MARKET WRAP UP

- Key equity indices ended with modest gains, backed by strength in index pivots. The S&P BSE Sensex, rose 192.35 points or 0.53% to settle at 36,578.96. The Nifty 50 index rose 54.90 points or 0.50% to settle at 10,961.85.
- Among secondary barometers, the BSE Mid-Cap index fell 0.56%. The BSE Small-Cap index fell 0.70%.

DERIVATIVES WATCH

- Nifty January series futures witnessed a fresh long position build up. Open Interest has been increased by 12627 contracts at the end of the day.
- Long position build up for the January series has been witnessed in RELIANCE, HDFCBANK.
- Short position build up for the January series has been witnessed in LT, ICICIBANK, HDFC.
- Unwinding of position for the January series has been witnessed COALINDIA, JETAIRWAYS.

CORPORATE NEWS

- HDFC Bank** posted NII at Rs 12,576.75 crore in December 2018 up 21.93% from Rs. 10314.34 crore in December 2017. Net profit at Rs. 5,585.85 crore in December 2018 up 20.32% from Rs. 4,642.60 crore in December 2017.
- Union Bank of India** posted NII at Rs 2,494.17 crore in December 2018 down 2.12% from Rs. 2548.26 crore in December 2017. Quarterly Net Profit at Rs. 153.21 crore in December 2018 up 112.26% from Rs. 1,249.85 crore in December 2017.
- Hindustan Zinc** posted net sales at Rs 5,540.00 crore in December 2018 down 6.45% from Rs. 5,922.00 crore in December 2017. Net profit at Rs. 2,211.00 crore in December 2018 down 0.85% from Rs. 2,230.00 crore in December 2017.
- Kotak Mahindra Bank** posted consolidated NII at Rs 3,804.05 crore in December 2018 Up 19.4% from Rs. 3185.9 crore in December 2017. Net profit at Rs. 1,844.01 crore in December 2018 up 13.53% from Rs. 1,624.24 crore in December 2017.
- Housing & Urban Development Corporation** posted net sales at Rs 1,310.53 crore in December 2018 up 23.11% from Rs. 1,064.49 crore in December 2017. Net profit at Rs. 328.26 crore in December 2018 up 100.66% from Rs. 163.59 crore in December 2017.
- Gujarat Heavy Chemicals** has registered 44% jump in its third quarter (Q3FY19) net profit to Rs 102.5 crore against Rs 71.2 crore in the same quarter last fiscal. Revenue of the company was up 21% at Rs 869.9 crore against Rs 717.9 crore.
- SBI Life Insurance Company** posted net sales at Rs 291.61 crore in December 2018 up 19.44% from Rs. 244.15 crore in December 2017. Net profit at Rs. 264.28 crore in December 2018 up 14.76% from Rs. 230.28 crore in December 2017.
- ICICI Lombard General Insurance Company** posted net sales at Rs 371.90 crore in December 2018 down 3.78% from Rs. 386.52 crore in December 2017. Net profit at Rs. 239.14 crore in December 2018 up 3.18% from Rs. 231.76 crore in December 2017.
- South Indian Bank** posted NII at Rs 519.62 crore in December 2018 up 2.01% from Rs. 509.39 crore in December 2017. Net profit at Rs. 83.85 crore in December 2018 down 27.09% from Rs. 115.00 crore in December 2017.
- Zee Learn** posted consolidated net sales at Rs 112.71 crore in December 2018 Up 116.05% from Rs. 52.17 crore in December 2017. Net profit at Rs. 12.62 crore in December 2018 Up 63.67% from Rs. 7.71 crore in December 2017.
- Aro Granite Industries** posted net sales at Rs 39.78 crore in December 2018 down 13.01% from Rs. 45.73 crore in December 2017. Net profit at Rs. 4.16 crore in December 2018 up 2876.84% from Rs. 0.14 crore in December 2017.

INDEX CHART



GLOBAL NEWS

- China's gross domestic product climbed a seasonally adjusted 1.5% on quarter in the fourth quarter of 2018, down from 1.6% in the third quarter. On an annualized basis, GDP expanded 6.4% - down from 6.5% in the three months prior.
- China's industrial production climbed 5.7% on year in December, up from 5.4% in November. Retail sales were up an annual 8.2% - which would have been unchanged. Fixed asset investment gained 5.9% on year - unchanged from the November.
- China's unemployment rate stood at 4.9% in December, 0.1% lower than that in December of the previous year.
- U.S. industrial production rose by 0.3% in December after climbing by a downwardly revised 0.4% in November. The manufacturing output surged up by 1.1% in December after inching up by 0.1% in November.
- U.S. preliminary report said the consumer sentiment index plummeted to 90.7 in January from the final December reading of 98.3.

ECONOMIC NEWS

- Crude Oil traded at US\$ 53.64/ bbl (IST 17:00).
- INR weakened to Rs. 71.28 from Rs. 71.18 against each US\$ resulting in daily change of 0.13%.
- With customs revenue from oil imports now touching more than Rs.30,000 crores per annum, Solvent Extraction Association (SEA) has demanded that a part of this money should be diverted to Oilseed Development Fund.
- India is considering a plan to transfer cash to farmers to ease their financial burden instead of offering subsidies.
- Indian Sugar Mills Association (ISMA) has lowered India's 2018-19 sugar production estimate by 2.5% to 307 lakh tonnes from first advance estimate of 315 lakh tonnes issued in October 2018.
- India and European economic major Netherlands last week signed Customs Treaty which will boost trade ties between the two countries through an efficient management of customs rules.
- The US has accused India, China and other emerging economies of claiming rights and using exemptions from commitments meant for poorer nations in global trade negotiations.

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 22/01/2019

Asian Paints Limited	Financial Results	Cupid Limited	Financial Results/Other business matters
Havells India Limited	Financial Results	Genus Power Infrastructures Limited	Financial Results
HDFC Life Insurance Co Ltd	Financial Results	Kirloskar Industries Limited	Financial Results
TVS Motor Company Limited	Financial Results	Opto Circuits (India) Limited	Other business matters
Alembic Pharmaceuticals Ltd	Financial Results	Agro Tech Foods Limited	Financial Results
ICICI Prudential Life Insurance Co Ltd	Financial Results		
Oberoi Realty Limited	Financial Results		
SHREE CEMENT LIMITED	Financial Results/Dividend		
Syngene International Limited	Financial Results		
Reliance Nippon Life Asset Management Ltd	Financial Results/Dividend		
Rane (Madras) Limited	Financial Results/Dividend		
Bharat Gears Limited	Financial Results		

INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	10961.85	10906.95	0.50%
S&P BSE SENSEX	36578.96	36386.61	0.53%
NIFTY MID100 FREE	17378.20	17517.20	-0.79%
NIFTY SML100 FREE	6312.75	6371.20	-0.92%

EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	29055.07	28532.06
NSE F&O	547130.74	513332.07

PREVIOUS FII POSITIONS (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	-	-
NET SELL	124.91	1029.78

SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	30770.44	30739.83	0.10%
BSE IT	14764.45	14670.87	0.64%
BSE CG	17617.61	17703.37	-0.48%
BSE OIL & GAS	13673.10	13578.59	0.70%
BSE FMCG	11847.35	11872.73	-0.21%
BSE AUTO	19702.58	19917.31	-1.08%
BSE HC	13842.01	13801.60	0.29%
BSE POWER	1940.92	1954.53	-0.70%
BSE METAL	11046.76	11080.32	-0.30%

TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
RELIANCE	1237.70	1184.35	4.50%
KOTAKBANK	1267.60	1240.20	2.21%
BAJAJFINSV	6384.55	6249.90	2.15%
BAJFINANCE	2594.20	2542.90	2.02%
SUNPHARMA	398.30	390.75	1.93%

ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	20719.33	20666.07	0.26%
HangSeng	27196.54	27090.81	0.39%
Straits Times	3220.56	3224.34	-0.12%
Shanghai	2610.51	2596.01	0.56%
Kospi	2124.61	2124.28	0.02%
Jakarta	6450.83	6448.16	0.04%
Taiwan	9889.40	9836.06	0.54%
KLSE Composite	1692.22	1682.97	0.55%
All Ordinaries	5953.50	5941.20	0.21%

TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
HEROMOTOCO	2794.25	2898.75	-3.61%
YESBANK	191.95	198.60	-3.35%
WIPRO	337.80	346.15	-2.41%
MARUTI	7208.40	7357.95	-2.03%
IOC	135.65	137.85	-1.60%

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