

MONTHLY **NEWS** LETTER

DECEMBER- 2018



MARKET MANTRA

Indira Securities Pvt. Ltd.

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- **EQUITY BROKING NSE& BSE**
- **DEPOSITORY SERVICES**
- **DEPOSITORY SERVICES**
- **COMMODITIES NCDEX & MCX**
- **DERIVATIVES NSE, BSE & FOREX**
- **CURRENCY DERIVATIVES NSE, BSE, MCX**
- **INSTITUTIONAL BROKING**
- **PORTFOLIO MANAGEMENT SERVICES**
- **E-BROKING**
- **MUTUAL FUND INVESTMENT**
- **ONLINE IPO BIDDING**
- **INSURANCE ADVISORY**
- **INSPIRE EDUCATION**

MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	36194.3	34442.05	5.09%
NIFTY	10876.8	10386.6	4.72%
BANK NIFTY	26862.95	25153.00	6.08%

MARKET COMMENTARY

- The outcome of the Reserve Bank of India's (RBI) monetary policy meeting, assembly elections, domestic and global macroeconomic data, trend in global markets, the movement of rupee against the dollar and crude oil price movement will dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.
- On the macro front, the government will announce data on third quarter gross domestic product (GDP) after market hours on Friday, 30 November 2018. The Indian economy grew 8.2% year-on-year in the second quarter, above 7.7% in the previous three months.
- On the political front, state assembly elections will be closely watched. Polling in Rajasthan and Telangana will be held on 7 December 2018. Assembly elections in Madhya Pradesh and Mizoram were held on 28 November 2018. The election to the 90-member Chhattisgarh Assembly was held in two phases 12 and 20 November 2018. Counting of votes will be held across all the five states on 11 December 2018.
- On the global front, investors are awaiting outcome of the two-day G-20 summit in Argentina which began on Friday. Trade will be high on the agenda at the G20. Investors will monitor talks between the United States and China for any signs of a breakthrough that would ease tensions and help avoid more tariffs.
- U.S. Stocks Climb, Bonds Rise with Trade Talks Due: Markets Wrap: - U.S. stocks rose in early trading, with investors focused on the outlook for trade ahead of a meeting between the American and Chinese presidents. Treasuries edged higher and oil fell.



BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	15039.35	14612.59	2.92%
SMALCAP	14427.16	14201.37	1.59%
METAL	11831.86	12524.55	-5.53%
OIL&GAS	13246.2	13246.92	-0.01%
AUTO	20900.17	19881.08	5.13%
TECK	7170.23	7234.59	-0.89%
BANKEX	29948.98	28359.59	5.60%
IT	14296.74	14531.6	-1.62%
FMCG	11647.29	11127.84	4.67%
HC	14332.65	14726.58	-2.67%
PSU	6840.02	7080.27	-3.39%
CD	20526.45	19142.33	7.23%
POWER	1911.27	1958.13	-2.39%
CG	18639.37	17488.58	6.58%
REALITY	1791.68	1679.8	6.66%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	25538.5	25115.8	1.68%
NASDAQ	7330.54	7305.9	0.34%
FTSE	6980.24	7128.1	-2.07%
NIKKEI	22351.1	21784	2.60%
HANGSENG	26506.8	25355	4.54%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1229.2	1218.6	0.87%
SILVER	14.35	14.31	0.28%
CRUDE	53.77	65.12	-17.43%

CURRENCY	CLOSE	PREV. CLOSE
INR-1 USD	69.6574	73.9936
INR-1 EURO	79.3588	83.9250
INR-100 YEN	61.4300	65.3600
INR-1 POUND	89.0848	94.1016



NIFTY THIS MONTH = +490

NIFTY TECHNICAL

MONTHLY	RESISTANCE	SUPPORT
1	10946	9915
2	11506	9444
3	11977	8884

NIFTY MOVING AVERAGE(MONTHLY)

20 Days	10418
50 Days	9148
100 Days	7507
200 Days	5288

TOP GAINERS

SCRIPT	CMP	% CHANGE
Kwality	11.14	74.61
Linde India	680	44.63
Vakrangee	32.2	37.02
Jet Airways	305.8	33.51
Adani Transmission L	224.9	26.17

TOP LOSERS

SCRIPT	CMP	% CHANGE
Arvind Ltd.	103.05	-68.48
Britannia Ind.	3159.25	-43.71
Shankara Building Pr	681.15	-38.02
Deepak Fertilisers	160.9	-23.01
PC Jeweller L	68.75	-22.23

Stock at 52 Week High

SCRIPT	CMP
Dr. Reddys Labs	2,713.35
Apollo Hospital Ent.	1,262.30
Esab India	1,029.00
Sakuma Exports	29.00

Stock at 52 Week Low

SCRIPT	CMP
Coal India	244.30
NTPC	139.95
General Insuranc	286.00
Finolex Cables	458.75
Gujarat Pipavav Port	95.15

FII & DII ACTIVITY- NOV 2018

	AMOUNT
FII	+5283
DII	+800

<i>DATE</i>	<i>TIME</i>	<i>CURRENCY</i>	<i>ECONOMIC DATA</i>	<i>FORECAST</i>	<i>PREVIOUS</i>
MonDec 3	3:00pm	GBP	Manufacturing PMI	51.6	MonDec 3
	5:00pm	USD	FOMC Member Clarida Speaks		
	6:30pm	USD	FOMC Member Quarles Speaks		
	7:45pm	USD	FOMC Member Williams Speaks		
	8:30pm	USD	ISM Manufacturing PMI	57.5	
	9:00pm	USD	FOMC Member Brainard Speaks		
	11:00pm	GBP	MPC Member Haldane Speaks		
TueDec 4	2:45pm	GBP	BOE Gov Carney Speaks		TueDec 4
	3:00pm	GBP	Construction PMI	52.5	
	8:30pm	USD	FOMC Member Williams Speaks		
	11:30pm	GBP	MPC Member Vlieghe Speaks		
WedDec 5	2:00pm	EUR	ECB President Draghi Speaks		WedDec 5
	3:00pm	GBP	Services PMI	52.5	
	6:45pm	USD	Fed Chair Powell Testifies		
		USD	ADP Non-Farm Employment Change	196K	
	8:30pm	USD	ISM Non-Manufacturing PMI	59.2	
	9:00pm	USD	Crude Oil Inventories		
ThuDec 6	6:45am	USD	FOMC Member Quarles Speaks		ThuDec 6
	All Day	All	OPEC Meetings		
	3:30pm	GBP	MPC Member Ramsden Speaks		
	10:45pm	USD	FOMC Member Bostic Speaks		
FriDec 7	5:00am	USD	FOMC Member Williams Speaks		FriDec 7
	5:15am	USD	Fed Chair Powell Speaks		
	5:30am	JPY	Average Cash Earnings y/y	1.00%	
	7:00pm	USD	Average Hourly Earnings m/m	0.30%	
		USD	Non-Farm Employment Change	200K	
		USD	Unemployment Rate	3.70%	
	8:30pm	USD	Prelim UoM Consumer Sentiment	97.1	
	10:30pm	USD	FOMC Member Brainard Speaks		

SatDec 8	Tentative	CNY	Trade Balance		SatDec 8
SunDec 9					SunDec 9
MonDec 10	3:00pm	GBP	GDP m/m		MonDec 10
		GBP	Manufacturing Production m/m		
TueDec 11	3:00pm	GBP	CPI y/y		TueDec 11
		GBP	PPI Input m/m		
		GBP	RPI y/y		
	3:30pm	EUR	German ZEW Economic Sentiment		
	7:00pm	USD	PPI m/m		
		USD	Core PPI m/m		
WedDec 12	3:00pm	GBP	Average Earnings Index 3m/y		WedDec 12
		GBP	Unemployment Rate		
	7:00pm	USD	CPI m/m		
		USD	Core CPI m/m		
	9:00pm	USD	Crude Oil Inventories		
ThuDec 13	6:15pm	EUR	Main Refinancing Rate		ThuDec 13
	7:00pm	EUR	ECB Press Conference		
FriDec 14	7:30am	CNY	Fixed Asset Investment ytd/y		FriDec 14
		CNY	Industrial Production y/y		
	7:00pm	USD	Core Retail Sales m/m		
		USD	Retail Sales m/m		
SatDec 15	All Day	JPY	Lower House Elections		SatDec 15
SunDec 16					SunDec 16
MonDec 17					MonDec 17
TueDec 18	2:30pm	EUR	German Ifo Business Climate		TueDec 18
	7:00pm	USD	Building Permits		
		USD	Housing Starts		
WedDec 19	7:00pm	USD	Current Account		WedDec 19
	9:00pm	USD	Crude Oil Inventories		
ThuDec 20	12:30am	USD	FOMC Economic Projections		ThuDec 20
		USD	FOMC Statement		
		USD	Federal Funds Rate		
	1:00am	USD	FOMC Press Conference		
	Tentative	JPY	BOJ Policy Rate		

	Tentative	JPY	Monetary Policy Statement		
	Tentative	JPY	BOJ Press Conference		
	Tentative	All	OPEC-JMMC Meetings		
	3:00pm	GBP	Retail Sales m/m		
		GBP	Public Sector Net Borrowing		
	5:30pm	GBP	MPC Official Bank Rate Votes		
		GBP	Monetary Policy Summary		
		GBP	Official Bank Rate		
		GBP	Asset Purchase Facility		
		GBP	MPC Asset Purchase Facility Votes		
	7:00pm	USD	Philly Fed Manufacturing Index		
FriDec 21	1:45pm	EUR	French Flash Manufacturing PMI		FriDec 21
		EUR	French Flash Services PMI		
	2:00pm	EUR	German Flash Manufacturing PMI		
		EUR	German Flash Services PMI		
	2:30pm	EUR	Flash Manufacturing PMI		
		EUR	Flash Services PMI		
	3:00pm	GBP	Current Account		
		GBP	Final GDP q/q		
	7:00pm	USD	Core Durable Goods Orders m/m		
		USD	Final GDP q/q		
		USD	Core PCE Price Index m/m		
		USD	Durable Goods Orders m/m		
		USD	Personal Spending m/m		
ThuDec 27	6:15pm	USD	Chicago PMI		ThuDec 27
	8:30pm	USD	CB Consumer Confidence		
FriDec 28	All Day	EUR	German Prelim CPI m/m		FriDec 28
	8:30pm	USD	Revised UoM Consumer Sentiment		
	9:30pm	USD	Crude Oil Inventories		

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