

MONTHLY
NEWS
LETTER

FEBRUARY- 2019



MARKET MANTRA

Indira Securities Pvt. Ltd.

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MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	36469.43	36175.59	0.81%
NIFTY	10893.70	10881	0.12%
BANK NIFTY	27085.00	27160	-0.28%



MARKET COMMENTARY

- The outcome of the Reserve Bank of India's (RBI) monetary policy meeting, domestic 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 also be monitored. RBI's Monetary Policy Committee (MPC) meeting is scheduled from 5 to 7 February 2019 for sixth bi-monthly monetary policy for 2018-19. The resolution of the MPC will be announced on 7 February 2019.
- On the global front, US ISM Non-Manufacturing PMI data for January will be unveiled on Tuesday, 5 February 2019. The ISM Non-Manufacturing PMI index for the United States was revised higher to 58 in December of 2018 from a preliminary of 57.6.
- US Balance of Trade data for November will be declared on Wednesday, 6 February 2019. The US trade deficit widened to \$55.5 billion in October 2018 from an upwardly revised \$54.6 billion in the previous month.
- In the previous meeting, MPC kept the policy repo rate under the liquidity adjustment facility (LAF) unchanged at 6.5%. Consequently, the reverse repo rate under the LAF remained at 6.25%, and the marginal standing facility (MSF) rate and the Bank Rate at 6.75%.

BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	14641.38	15430.63	-5.11%
SMALCAP	13950.45	14783.44	-5.63%
METAL	10542.63	11530.86	-8.57%
OIL&GAS	13633.78	13702.54	-0.50%
AUTO	18985.17	20475.34	-7.28%
TECK	7585.37	7157.97	5.97%
BANKEX	30412.15	30595.29	-0.60%
IT	15433.98	14284.96	8.04%
FMCG	11748.28	11812.98	-0.55%
HC	13997.3	13950.05	0.34%
PSU	6846.55	7253.97	-5.62%
CD	21412.99	20812.83	2.88%
POWER	1887.82	1998.91	-5.56%
CG	17462.98	18767.78	-6.95%
REALITY	1797.76	1845.98	-2.61%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	25063.9	23327.5	7.44%
NASDAQ	7263.87	6635.28	9.47%
FTSE	7020.22	6728.13	4.34%
NIKKEI	20788.4	20014.8	3.87%
HANGSENG	27930.7	25160.5	11.01%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1322	1286.1	2.79%
SILVER	15.91	15.45	2.98%
CRUDE	55.37	44.97	23.13%

CURRENCY	CLOSE	PREV. CLOSE
INR-1 USD	71.1102	69.7131
INR-1 EURO	81.3425	79.9330
INR-100 YEN	65.3100	63.5700
INR-1 POUND	93.1681	88.9748



NIFTY THIS MONTH = +12

NIFTY TECHNICAL		
MONTHLY	RESISTANCE	SUPPORT
1	11017	10613
2	11204	10396
3	11421	10210

NIFTY MOVING AVERAGE(MONTHLY)	
20 Days	10625
50 Days	9296
100 Days	7659
200 Days	5435

TOP GAINERS		
SCRIPT	CMP	% CHANGE
Vakrangee	45.25	31.54
KRBL Ltd.	363	26.83
Axis Bank Ltd.	716.4	17.84
Va Tech Wabag Ltd.	298.25	16.69
NIIT Technologies	1317.1	16.13

TOP LOSERS		
SCRIPT	CMP	% CHANGE
Gujarat Gas	126.3	-81.09
Dewan Housing	111.45	-52.55
KPIT Technologies	114	-45.88
IL&FS Transportation	7.2	-40.05
Dish TV India Ltd.	24.4	-35.7

Stock at 52 Week High	
SCRIPT	CMP
Infosys	756.55
Wipro	371.35
Dr. Reddys Labs	2,786.90
Havells India	736.40
UPL	777.55

Stock at 52 Week Low	
SCRIPT	CMP
Hindustan Zinc	255.15
Vedanta	162.30
Grasim Industries	720.70
Motherson Sumi	139.10
ICICI Prudential	286.60

FII & DII ACTIVITY- JAN 2019	
	AMOUNT
FII	+128
DII	+2147

<i>DATE</i>	<i>TIME</i>	<i>CURRENCY</i>	<i>ECONOMIC DATA</i>	<i>FORECAST</i>	<i>PREVIOUS</i>
FriFeb 1	7:15am	CNY	Caixin Manufacturing PMI	49.5	49.7
	3:00pm	GBP	Manufacturing PMI	53.5	54.2
	3:30pm	EUR	CPI Flash Estimate y/y	1.40%	1.60%
		EUR	Core CPI Flash Estimate y/y	1.00%	1.00%
	7:00pm	USD	Average Hourly Earnings m/m	0.30%	0.40%
		USD	Non-Farm Employment Change	165K	222K
		USD	Unemployment Rate	3.90%	3.90%
	8:30pm	USD	ISM Manufacturing PMI	54.1	54.1
		USD	Revised UoM Consumer Sentiment	90.8	90.7
SatFeb 2					
SunFeb 3					
MonFeb 4					
TueFeb 5	3:00pm	GBP	Services PMI	51.1	51.2
	8:30pm	USD	ISM Non-Manufacturing PMI	57	57.6
WedFeb 6					
ThuFeb 7	4:35am	USD	FOMC Member Quarles Speaks		
	5:30am	USD	Fed Chair Powell Speaks		
	3:30pm	EUR	EU Economic Forecasts		
	5:30pm	GBP	BOE Inflation Report		
		GBP	MPC Official Bank Rate Votes	0-0-9	0-0-9
		GBP	Monetary Policy Summary		
		GBP	Official Bank Rate	0.75%	0.75%
	8:00pm	USD	FOMC Member Clarida Speaks		
FriFeb 8	5:30am	JPY	Average Cash Earnings y/y	1.80%	1.70%
	6:00am	USD	FOMC Member Bullard Speaks		
SatFeb 9					
SunFeb 10					
MonFeb 11	3:00pm	GBP	GDP m/m		
		GBP	Manufacturing Production m/m		

		GBP	Prelim GDP q/q		
		GBP	Prelim Business Investment q/q		
TueFeb 12					
WedFeb 13	Tentative	CNY	Trade Balance		
	3:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
		GBP	RPI y/y		
	Tentative	USD	Advance GDP q/q	2.60%	3.40%
	7:00pm	USD	CPI m/m		
		USD	Core CPI m/m		
	Tentative	USD	Core Durable Goods Orders m/m	0.20%	-0.30%
	Tentative	USD	Core Retail Sales m/m	0.00%	0.20%
	Tentative	USD	Retail Sales m/m	0.10%	0.20%
	Tentative	USD	Advance GDP Price Index q/q	1.70%	1.80%
	Tentative	USD	Core PCE Price Index m/m	0.20%	0.10%
	Tentative	USD	Durable Goods Orders m/m	0.80%	0.80%
	Tentative	USD	Personal Spending m/m	0.30%	0.40%
ThuFeb 14	5:20am	JPY	Prelim GDP q/q		
	12:30pm	EUR	German Prelim GDP q/q		
	3:30pm	EUR	Flash GDP q/q		
	7:00pm	USD	PPI m/m		
		USD	Core PPI m/m		
FriFeb 15	7:00am	CNY	CPI y/y		
	3:00pm	GBP	Retail Sales m/m		
	7:00pm	USD	Core Retail Sales m/m		
		USD	Retail Sales m/m		
	8:30pm	USD	Prelim UoM Consumer Sentiment		
SatFeb 16					
SunFeb 17					
MonFeb 18					
TueFeb 19	3:00pm	GBP	Average Earnings Index 3m/y		
		GBP	Unemployment Rate		
	3:30pm	EUR	German ZEW Economic Sentiment		
WedFeb 20	7:00pm	USD	Building Permits		

ThuFeb 21	12:30am	USD	FOMC Meeting Minutes		
	1:45pm	EUR	French Flash Manufacturing PMI		
		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	Public Sector Net Borrowing		
	Tentative	GBP	Inflation Report Hearings		
	6:00pm	EUR	ECB Monetary Policy Meeting Accounts		
	7:00pm	USD	Philly Fed Manufacturing Index		
FriFeb 22	2:30pm	EUR	German Ifo Business Climate		
	8:30pm	USD	Revised UoM Consumer Sentiment		
SatFeb 23					
SunFeb 24					
MonFeb 25					
TueFeb 26	8:30pm	USD	CB Consumer Confidence		
WedFeb 27	6:45pm	USD	ADP Non-Farm Employment Change		
	7:00pm	USD	Core Durable Goods Orders m/m		
		USD	Durable Goods Orders m/m		
ThuFeb 28	6:30am	CNY	Manufacturing PMI		
		CNY	Non-Manufacturing PMI		
	All Day	EUR	German Prelim CPI m/m		
	7:00pm	USD	Prelim GDP q/q		
	8:15pm	USD	Chicago PMI		

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