

MONTHLY **NEWS** LETTER

MAY - 2019



MARKET MANTRA

Indira Securities Pvt. Ltd.

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- **ONLINE IPO BIDDING**
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MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	39031.55	38672.91	0.93%
NIFTY	11748.2	11623.9	1.07%
BANK NIFTY	29764.8	30426.8	-2.18%



MARKET COMMENTARY

- Investors will continue to wade through corporate results as fourth-quarter earnings season moves into full swing. Domestic financial market will remain closed on Monday, 29 April 2019, on account of General Elections (Lok Sabha) and on Wednesday, 1 May 2019, on account of Maharashtra Day.
- Britannia Industries will announce January-March 2019 quarterly earnings on Wednesday, 1 May 2019.
- Dabur India and Tata Power will announce January-March 2019 quarterly earnings on Thursday, 2 May 2019.
- Hindustan Unilever will announce January-March 2019 quarterly earnings on Friday, 3 May 2019.
- On the economic front, the Nikkei India Manufacturing PMI data for April will be disclosed on Thursday, 2 May 2019. The Nikkei India Manufacturing PMI dropped to a six-month low of 52.6 in March 2019 from 54.3 in the preceding month.
- Trend in global markets, the movement of rupee against the dollar and crude oil price movement will also be monitored. Investors will keep a watch on inflows from foreign portfolio investors (FPIs) and domestic institutional investors (DIIs).
- On the political front, the fourth phase of voting in the 2019 Lok Sabha election will take place across 71 parliamentary constituencies in nine states on 29 April 2019. The 2019 Indian general election, which is scheduled to be held in seven phases, kicked off on 11 April 2019. It will conclude on 19 May 2019. The counting of votes will be conducted on 23 May 2019, and on the same day the results will be declared.

BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	14889.42	15479.62	-3.81%
SMALCAP	14624.56	15027.36	-2.68%
METAL	11513.24	11355.12	1.39%
OIL&GAS	15357.85	15269.7	0.58%
AUTO	18839.4	18824.89	0.08%
TECK	7979.32	7621.79	4.69%
BANKEX	33328.45	34141.94	-2.38%
IT	16263.51	15280.3	6.43%
FMCG	11764.37	11741.51	0.19%
HC	14367.02	14407.89	-0.28%
PSU	7446.22	7640.47	-2.54%
CD	23873.81	23856.65	0.07%
POWER	1969.54	2034.41	-3.19%
CG	18030.56	18471.99	-2.39%
REALITY	2008.64	2077.09	-3.30%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	26430.1	25928.7	1.93%
NASDAQ	8049.64	7729.32	4.14%
FTSE	7385.26	7279.19	1.46%
NIKKEI	22258.7	21205.8	4.97%
HANGSENG	29766	29051.4	2.46%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1275.5	1290.8	-1.19%
SILVER	14.66	15.1	-2.91%
CRUDE	63.41	60.18	5.37%

CURRENCY RATES

CURRENCY	CLOSE	PRV. CLOSE	
INR-1 USD	69.8368	69.1713	
INR-1 EURO	78.0771	77.7024	
INR-100 YEN	62.6800	62.5200	
INR-1 POUND	90.3348	90.4756	



NIFTY THIS MONTH = +178

NIFTY TECHNICAL		
MONTHLY	RESISTANCE	SUPPORT
1	11897	11083
2	12170	10543
3	12710	10270

NIFTY MOVING AVERAGE(MONTHLY)	
20 Days	10789
50 Days	9407
100 Days	7771
200 Days	5541

TOP GAINERS		
SCRIPT	CMP	% CHANGE
PC Jeweller L	118.9	42.91
Orient Cement Ltd.	106.95	31.47
Indiabulls Real Esta	115.1	25.04
Vakrangee	62.65	19.68
Shankara Building Pr	517.2	18.75

TOP LOSERS		
SCRIPT	CMP	% CHANGE
Reliance Com	1.71	-54.64
Reliance Power L	6.05	-43.88
Jet Airways	153.3	-42.13
YES Bank Ltd.	168	-40.09
Reliance Capital	132.85	-34.67

STOCKS AT 52 Wk HIGH	
SCRIPT	CMP
Wipro	298.40
HCL Tech.	1,183.35
Bajaj Finserv	7,532.00
Shree Cement	19,738.15
UPL	967.50

STOCKS AT 52 Wk LOW	
SCRIPT	CMP
Hero MotoCorp	2,512.65
IDBI	39.40
MRF	52,925.20
Natco Pharma	544.15
Graphite India	383.50

FII & DII ACTIVITY- APR 2019	
	AMOUNT
FII	+12750
DII	-4219

MAJOR EVENTS IN THIS MONTH

DATE	TIME	CUR	EVENT	FORCAST	PREVIOUS
WedMay 1	2:00pm	GBP	Manufacturing PMI	53.2	55.1
		GBP	Net Lending to Individuals m/m	4.5B	4.5B
	5:45pm	USD	ADP Non-Farm Employment Change	181K	151K
	7:30pm	USD	ISM Manufacturing PMI	55	55.3
	11:30pm	USD	FOMC Statement		
		USD	Federal Funds Rate	<2.50%	<2.50%
ThuMay 2	12:00am	USD	FOMC Press Conference		
	4:30pm	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%
		GBP	Asset Purchase Facility	435B	435B
		GBP	MPC Asset Purchase Facility Votes	0-0-9	0-0-9
	5:00pm	GBP	BOE Gov Carney Speaks		
FriMay 3	Tentative	USD	Treasury Currency Report		
	2:00pm	GBP	Services PMI	50.4	48.9
	2:30pm	EUR	CPI Flash Estimate y/y	1.60%	1.40%
		EUR	Core CPI Flash Estimate y/y	1.00%	0.80%
	6:00pm	USD	Average Hourly Earnings m/m	0.30%	0.10%
		USD	Non-Farm Employment Change	181K	196K
		USD	Unemployment Rate	3.80%	3.80%
	7:30pm	USD	ISM Non-Manufacturing PMI	57.2	56.1
	7:45pm	USD	FOMC Member Evans Speaks		
	9:00pm	USD	FOMC Member Clarida Speaks		
	11:15pm	USD	FOMC Member Williams Speaks		
SatMay 4	12:30am	USD	FOMC Member Bowman Speaks		
	5:15am	USD	FOMC Member Bullard Speaks		
SunMay 5					

MonMay 6	7:15am	CNY	Caixin Services PMI		54.4
TueMay 7	2:30pm	EUR	EU Economic Forecasts		
WedMay 8	Tentative	CNY	Trade Balance		221B
	5:00pm	EUR	ECB Monetary Policy Meeting Accounts		
ThuMay 9	7:00am	CNY	CPI y/y		2.30%
	6:00pm	USD	PPI m/m		0.60%
		USD	Core PPI m/m		0.30%
FriMay 10	2:00pm	GBP	GDP m/m		0.20%
		GBP	Manufacturing Production m/m		0.90%
		GBP	Prelim GDP q/q		0.20%
		GBP	Prelim Business Investment q/q		-0.90%
	11th-15th	CNY	New Loans		1690B
	6:00pm	USD	CPI m/m		0.40%
		USD	Core CPI m/m		0.10%
SatMay 11					
SunMay 12					
MonMay 13					
TueMay 14	2:00pm	GBP	Average Earnings Index 3m/y		
		GBP	Unemployment Rate		
WedMay 15	7:30am	CNY	Fixed Asset Investment ytd/y		
		CNY	Industrial Production y/y		
	11:30am	EUR	German Prelim GDP q/q		
	2:30pm	EUR	Flash GDP q/q		
	6:00pm	USD	Core Retail Sales m/m		
		USD	Retail Sales m/m		
ThuMay 16	Tentative	All	OPEC-JMMC Meetings		
	6:00pm	USD	Building Permits		
		USD	Philly Fed Manufacturing Index		
FriMay 17	2:00pm	GBP	Retail Sales m/m		
	7:30pm	USD	Prelim UoM Consumer Sentiment		

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