



01 Mar.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,480	(0.1) %	13.4 %
BSE SENSEX	34,184	(0.5) %	14.1 %
CNX BANK	25,022	(0.3) %	16.1 %
CNX MIDCAP	19,635	(0.2) %	13.3 %
CNX SMALLCAP	8,378	0.3 %	18.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,029	(1.5) %	0.8 %
S&P 500	2,714	(1.1) %	0.7 %
FTSE 100	7,232	(0.7) %	(5.4) %
HANG SENG	30,845	(1.4) %	1.1 %
NIKKEI	22,068	(1.4) %	(6.1) %
SHANGHAI COMPOSITE	3,259	(1.0) %	(2.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.17	0.6 %	2.4 %
EUR/USD	1.22	(1.2) %	1.5 %
GBP/USD	1.37	(1.6) %	1.7 %
USD/JPY	106.70	(0.2) %	(5.3) %
USD/AUD	1.29	1.8 %	1.2 %
USD/SGD	1.33	0.8 %	(0.6) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(1.4) %	4.4 %
Gold(INR/10g)	30,398	(0.3) %	3.5 %
Gold Comex(USD/oz)	1,319	(1.3) %	0.8 %
SILVER(INR/1Kg)	38,189	(0.7) %	(1.1) %
Aluminium(USD/MT)	2,173	(0.7) %	(3.7) %
Copper(USD/MT)	7,028	(1.2) %	(2.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

**Global Economy:** US Commerce Department on Wednesday showed slightly slower than previously estimated US economic growth in the fourth quarter of 2017. The report said gross domestic product climbed by 2.5% in the fourth quarter compared to the previously estimated 2.6% increase. China's official manufacturing purchasing managers' index fell to 50.3 in February from 51.3 in January, government data showed Wednesday. A score above 50 indicates an expansion; below 50 indicates a decline. Japanese industrial production fell 6.6% in January from a month earlier, following December's 2.9% increase. The consumer confidence in United Kingdom weakened slightly in February, the latest survey from GfK showed on Wednesday with an index score of -10. That was down from -9 in January. Also, the British Retail Consortium noted that shop prices slid 0.8% on year, down from -0.5% in previous month.

**Global Equities:** US stocks saw heavy losses for a second session. World stocks declined across the board following a sharp pullback in US stocks after Powell's hawkish comments to Congress. A weaker-than-expected economic data from China and Japan also dampened sentiment.

**Indian Economy:** India's Gross Domestic Product (GDP) growth has further accelerated 7.2% in the quarter ended December 2017 (Q3 of 2017-18), showing improvement from 6.5% growth in the preceding last quarter and 6.8% in the corresponding quarter last year. Quarterly Gross Value Added (GVA) also rose at improved pace of 6.7% in Q3 of 2017-18 over the corresponding quarter of previous year, showing improvement in growth from 6.2% in Q2 of 2017-18. The GDP growth stood at 6.4% in April-December 2017, compared with 7.5% recorded in the corresponding period last year.

**Equity Markets:** Local shares declined on weak trend in global equity markets after hawkish comments from US Federal Reserve chair Jerome Powell. Selling in private sector banks shares put pressure on indices. IT shares bucked weak market trend as rupee weakened past 65-mark against the dollar. After hitting a fresh intraday low in early trade, key indices were stuck in a range till afternoon trade. Indices pared losses in mid-afternoon trade. Recovery, however, proved short lived as benchmarks slipped to trade near the day's low once again in late trade.

**Corporate News:** Auto stocks will be in focus as the auto companies will start announcing monthly sales numbers for February 2018 from today, 1 March 2018. The Nikkei India Manufacturing Purchasing Managers' Index (PMI) fell to 52.1 in February 2018 from 52.4 in January 2018. The PMI registered above the neutral 50 threshold for the seventh consecutive month and indicated a modest improvement in operating conditions. Zydus Cadila said it has received final approval from US health regulator to market Dexmedetomidine Hydrochloride injection used for sedation of intubated and mechanically ventilated patients. Dilip Buildcon has been declared lowest bidder by the National Highways Authority of India for three new hybrid annuity projects valued at Rs 5390 crore in Karnataka and Jharkhand respectively.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(134.9)	(98.0)	6.4
MF(INR cr)	1,673.3	779.1	562.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,198	36,463	33,419
F&O(INR cr)	778,711	843,506	649,903

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.6	22.6	11.8
NSE VIX	13.8	16.3	12.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,107	(1.1) %	16.5 %	Energy	13,991	(0.0) %	18.4 %
IT	12,809	0.5 %	20.9 %	Pharma	8,960	(0.7) %	(14.7) %
Metals	3,994	(1.1) %	28.6 %	Finance	10,439	(1.2) %	18.3 %
Auto	11,157	(0.1) %	12.5 %	PSU	3,079	0.7 %	(12.7) %
FMCG	26,514	(0.8) %	12.2 %	Real Estate	327	(0.1) %	49.2 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Punjab Nat	101	3.1 %	(32.4) %	Vedanta	330	(3.2) %	20.9 %
Ashok Leyl	142	2.8 %	68.3 %	H P C L	380	(2.9) %	10.0 %
Infosys	1,173	1.9 %	16.2 %	ICICI Bank	313	(2.8) %	20.2 %
Oracle Fin	3,942	1.8 %	4.1 %	Sun TV Net	928	(2.4) %	16.7 %
Pidilite I	901	1.7 %	28.2 %	Power Fin.	105	(2.1) %	(28.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (FEB)	01-03-2018	05:30	AUD	-	135.3
Private Capital Expenditure (4Q)	01-03-2018	00:30	AUD	-	0.01
RBA Commodity Index SDR (YoY) (FEB)	01-03-2018	05:30	AUD	-	(0.006)
Current Account Balance (4Q)	01-03-2018	13:30	CAD	-	-
MLI Leading Indicator (MoM) (JAN)	01-03-2018	13:30	CAD	-	0.005
RBC Canadian Manufacturing PMI (FEB)	01-03-2018	14:30	CAD	-	55.9
Gross Domestic Product (QoQ) (4Q)	01-03-2018	06:45	CHF	-	0.006
Gross Domestic Product (YoY) (4Q)	01-03-2018	06:45	CHF	-	0.012
PMI Manufacturing (FEB)	01-03-2018	08:30	CHF	-	65.3
Retail Sales Real (YoY) (JAN)	01-03-2018	08:15	CHF	-	0.006
Caixin China PMI Mfg (FEB)	01-03-2018	01:45	CNY	-	51.5
Euro-Zone Unemployment Rate (JAN)	01-03-2018	10:00	EUR	-	0.087
Italian Annual Gross Domestic Product (YoY) (2017)	01-03-2018	10:00	EUR	-	0.009
Markit Eurozone Manufacturing PMI (FEB F)	01-03-2018	09:00	EUR	-	58.5
Markit France Manufacturing PMI (FEB F)	01-03-2018	08:50	EUR	-	56.1
Markit/ADACI Italy Manufacturing PMI (FEB)	01-03-2018	08:45	EUR	-	59
Markit/BME Germany Manufacturing PMI (FEB F)	01-03-2018	08:55	EUR	-	60.3
M4 Ex IOFCs 3M Annualised (JAN)	01-03-2018	09:30	GBP	-	0.047
M4 Money Supply (YoY) (JAN)	01-03-2018	09:30	GBP	-	0.037
Markit UK PMI Manufacturing s.a. (FEB)	01-03-2018	09:30	GBP	-	55.3
Money Supply M4 (MoM) (JAN)	01-03-2018	09:30	GBP	-	(0.006)
Mortgage Approvals (JAN)	01-03-2018	09:30	GBP	-	-
Net Consumer Credit (JAN)	01-03-2018	09:30	GBP	-	-
Net Lending Sec. on Dwellings (JAN)	01-03-2018	09:30	GBP	-	-
BOJ Kataoka makes a speech	01-03-2018	01:30	JPY	-	-
Consumer Confidence Index (FEB)	01-03-2018	05:00	JPY	-	44.7
Jobless Rate (JAN)	01-03-2018	23:30	JPY	-	0.028
Job-To-Applicant Ratio (JAN)	01-03-2018	23:30	JPY	-	1.59
Manufacturing PMI (YoY) (FEB)	01-03-2018	22:50	JPY	-	0.007



Monetary Base End of period (FEB)	01-03-2018	23:50	JPY	-	-
Nikkei Japan PMI Manufacturing (FEB F)	01-03-2018	01:30	JPY	-	54
Official Reserve Assets (FEB)	01-03-2018	00:00	JPY	-	-
Overall Household Spending (YoY) (JAN)	01-03-2018	23:30	JPY	-	(0.001)
Tokyo Consumer Price Index (YoY) (FEB)	01-03-2018	23:30	JPY	-	0.013
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (FEB)	01-03-2018	23:30	JPY	-	0.007
Tokyo CPI Ex-Fresh Food, Energy (YoY) (FEB)	01-03-2018	23:30	JPY	-	0.004
Vehicle Sales (YoY) (FEB)	01-03-2018	05:00	JPY	-	(0.057)
ANZ Consumer Confidence (MoM) (FEB)	01-03-2018	21:00	NZD	-	0.042
ANZ Consumer Confidence Index (FEB)	01-03-2018	21:00	NZD	-	126.9
Building Permits (MoM) (JAN)	01-03-2018	21:45	NZD	-	(0.096)
Construction Spending (MoM) (JAN)	01-03-2018	15:00	USD	-	0.007
Continuing Claims (17 FEB)	01-03-2018	13:30	USD	-	-
EIA Natural Gas Storage Change (23 FEB)	01-03-2018	15:30	USD	-	(124)
EIA Working Natural Gas Implied Flow (23 FEB)	01-03-2018	15:30	USD	-	(124)
Initial Jobless Claims (24 FEB)	01-03-2018	13:30	USD	-	-
ISM Employment (FEB)	01-03-2018	15:00	USD	-	54.2
ISM Manufacturing (FEB)	01-03-2018	15:00	USD	-	59.1
ISM New Orders (FEB)	01-03-2018	15:00	USD	-	65.4
ISM Prices Paid (FEB)	01-03-2018	15:00	USD	-	72.7
Markit US Manufacturing PMI (FEB F)	01-03-2018	14:45	USD	-	55.9
PCE Core (MoM) (JAN)	01-03-2018	13:30	USD	-	0.002
PCE Core (YoY) (JAN)	01-03-2018	13:30	USD	-	0.015
PCE Deflator (MoM) (JAN)	01-03-2018	13:30	USD	-	0.001
PCE Deflator (YoY) (JAN)	01-03-2018	13:30	USD	-	0.017
Personal Income (JAN)	01-03-2018	13:30	USD	-	0.004
Personal Spending (JAN)	01-03-2018	13:30	USD	-	0.004
Real Personal Spending (JAN)	01-03-2018	13:30	USD	-	0.003

..... End of Report .....

