



01 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,870	0.7 %	6.4 %
BSE SENSEX	35,867	(0.1) %	8.6 %
CNX BANK	27,014	0.8 %	11.0 %
CNX MIDCAP	16,846	0.7 %	(11.8) %
CNX SMALLCAP	6,007	1.2 %	(24.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,916	(0.3) %	11.1 %
S&P 500	2,784	(0.3) %	11.1 %
FTSE 100	7,075	(0.5) %	5.1 %
HANG SENG	28,633	(0.4) %	13.9 %
NIKKEI	21,385	(0.8) %	9.3 %
SHANGHAI COMPOSITE	2,941	(0.4) %	19.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.75	(0.5) %	1.9 %
EUR/USD	1.14	(0.1) %	(0.7) %
GBP/USD	1.33	0.1 %	4.1 %
USD/JPY	111.66	1.0 %	1.9 %
USD/AUD	1.41	1.1 %	(0.9) %
USD/SGD	1.35	0.2 %	(1.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	0.5 %	22.9 %
Gold(INR/10g)	33,250	(0.4) %	5.5 %
Gold Comex(USD/oz)	1,325	0.0 %	2.7 %
SILVER(INR/1Kg)	39,866	(0.7) %	4.2 %
Aluminium(USD/MT)	1,899	1.5 %	2.2 %
Copper(USD/MT)	6,533	1.0 %	11.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	0.0 %	0.1 %

Global Economy: The US Commerce Department said real gross domestic product rose by 2.6% in the fourth quarter compared to the 3.4% jump in the third quarter. China's official Manufacturing Purchasing Manager's Index (PMI) fell to 49.2 in February, data showed on Thursday, the weakest level since February 2016. The export orders fell at the fastest pace since the global financial crisis, highlighting deepening cracks in an economy facing weak demand at home and abroad. UK house price inflation index rose 0.4% in February year-on-year following a 0.1% increase in January, survey data from the Nationwide Building Society showed. On a month-on-month basis, house prices decreased 0.1%, partly reversing the 0.2% increase in January. Japan retail sales were down a seasonally adjusted 2.3% on month in January, the Ministry of Economy, Trade and Industry said on Thursday, following the 0.9% increase in December. On a yearly basis, retail sales advanced 0.6%, down from 1.3% in the previous month. Japan industrial production fell a seasonally adjusted 3.7% on month in January, following the 0.1% fall in December. On a yearly basis, industrial production was unchanged, following the 1.9% contraction in the previous month. Upon the release of the data, the METI downgraded its assessment of output, saying that industrial production is pausing.

Global Equities: Donald Trump and Kim Jong Un failed to reach agreement on denuclearization of Korean peninsula. US Trade Representative Robert Lighthizer dampened optimism about US-China trade talks.

Indian Economy: India's GDP grew a lower-than-expected 6.6% in the October-December period, the lowest in five quarters, dragged by lower farm and manufacturing growth. As per Second Advance Estimates for 2018-19, total Foodgrain production in the country is estimated at 281.37 million tonnes which is higher by 3.89 million tonnes or 1.40% than the production of foodgrain of 277.49 million tonnes in 2nd Advance Estimates of 2017-18. Further, the production during 2018-19 is higher by 15.63 million tonnes than the previous five years' (2013-14 to 2017-18) average production of foodgrain. The output of eight core industries comprising 40.27% of the weight of items included in the Index of Industrial Production (IIP) rose 1.8% in January 2019 over January 2018. Its cumulative output increased 4.5% in April to January 2018-19.

Equity Markets: Domestic stocks ended with small losses after a volatile session. Intraday volatility was high as traders rolled over positions in the F&O segment from the near month February 2019 series to March 2019 series. The February 2019 F&O contracts expired yesterday. The Nifty settled below 10,800 mark.

Corporate News: A multi-crore rupee fraud has unfolded at the State Bank of India (SBI) after the Mumbai-headquartered PSU banking giant informed about the fraudulent cases occurred in the nine months from April to December 2018. Shriram Transport Finance Company has allotted Rated, Listed, Secured, Redeemable, Partly Paid, Non-Convertible debentures on Private placement basis for an issue size of Rs. 150 crore on 28 February 2019. Trident has been conferred with an award for 'Outstanding Achiever for Exports' Category - Large Enterprise by Federation of Madhya Pradesh Chambers of Commerce & Industry, Bhopal, at 5th Outstanding Achievement Award 2017-18.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(58.4)	106.9	(21.2)
MF(INR cr)	(323.7)	387.3	426.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	44,868	34,977	34,356
F&O(INR cr)	1,701,135	947,811	966,656

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.8	15.2	16.6
NSE VIX	18.3	16.4	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,790	(0.0) %	10.1 %	Energy	14,819	0.9 %	11.5 %
IT	15,732	(1.1) %	23.8 %	Pharma	8,885	0.2 %	3.1 %
Metals	2,872	0.9 %	(18.9) %	Finance	11,227	(0.1) %	9.4 %
Auto	8,355	(0.8) %	(24.4) %	PSU	2,761	0.6 %	(3.3) %
FMCG	29,263	0.3 %	10.4 %	Real Estate	230	1.0 %	(22.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Motherson	163	4.7 %	(24.6) %	TCS	1,983	(3.6) %	36.3 %
P & G Hygi	10,763	3.8 %	14.6 %	Eicher Mot	19,869	(2.6) %	(29.8) %
NMDC	101	3.5 %	(14.6) %	Maruti Suz	6,830	(2.0) %	(24.2) %
Havells In	715	3.2 %	40.9 %	Hero Motoc	2,628	(1.9) %	(27.9) %
Coal India	228	3.1 %	(17.7) %	New India	173	(1.7) %	(51.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (FEB)	01-03-2019	5:30	AUD	-	124.5
RBA Commodity Index SDR (YoY) (FEB)	01-03-2019	5:30	AUD	-	0.069
Gross Domestic Product (MoM) (DEC)	01-03-2019	13:30	CAD	-	(0.001)
Gross Domestic Product (YoY) (DEC)	01-03-2019	13:30	CAD	-	0.017
MLI Leading Indicator (MoM) (JAN)	01-03-2019	13:30	CAD	-	(0.003)
Quarterly Gross Domestic Product Annualized (4Q)	01-03-2019	13:30	CAD	-	0.02
RBC Canadian Manufacturing PMI (FEB)	01-03-2019	14:30	CAD	-	53
Retail Sales Real (YoY) (JAN)	01-03-2019	7:30	CHF	-	(0.003)
PMI Manufacturing (FEB)	01-03-2019	8:30	CHF	-	54.3
Caixin China PMI Mfg (FEB)	01-03-2019	1:45	CNY	-	48.3
Euro-Zone Consumer Price Index Core (YoY) (FEB A)	01-03-2019	10:00	EUR	-	0.011
Euro-Zone Consumer Price Index Estimate (YoY) (FEB)	01-03-2019	10:00	EUR	-	0.014
Euro-Zone Unemployment Rate (JAN)	01-03-2019	10:00	EUR	-	0.079
Italian Annual Gross Domestic Product (2018)	01-03-2019	10:00	EUR	-	0.015
German Retail Sales (MoM) (JAN)	01-03-2019	7:00	EUR	-	(0.043)
German Retail Sales (YoY) (JAN)	01-03-2019	7:00	EUR	-	(0.021)
Markit/ADACI Italy Manufacturing PMI (FEB)	01-03-2019	8:45	EUR	-	47.8
Markit France Manufacturing PMI (FEB F)	01-03-2019	8:50	EUR	-	51.4
German Unemployment Change (000's) (FEB)	01-03-2019	8:55	EUR	-	-
German Unemployment Claims Rate s.a. (FEB)	01-03-2019	8:55	EUR	-	0.05
Markit/BME Germany Manufacturing PMI (FEB F)	01-03-2019	8:55	EUR	-	47.6
Markit Eurozone Manufacturing PMI (FEB F)	01-03-2019	9:00	EUR	-	49.2
M4 Ex IOFCs 3M Annualised (JAN)	01-03-2019	9:30	GBP	-	0.043
M4 Money Supply (YoY) (JAN)	01-03-2019	9:30	GBP	-	0.02
Markit UK PMI Manufacturing s.a. (FEB)	01-03-2019	9:30	GBP	-	52.8
Money Supply M4 (MoM) (JAN)	01-03-2019	9:30	GBP	-	0.004
Mortgage Approvals (JAN)	01-03-2019	9:30	GBP	-	-
Net Consumer Credit (JAN)	01-03-2019	9:30	GBP	-	-
Net Lending to the Private Sector (JAN)	01-03-2019	9:30	GBP	-	-



Nikkei Japan PMI Manufacturing (FEB F)	01-03-2019	0:30	JPY	-	48.5
Consumer Confidence Index (FEB)	01-03-2019	5:00	JPY	-	41.9
Vehicle Sales (YoY) (FEB)	01-03-2019	5:00	JPY	-	0.023
Markit Mexico PMI Mfg (FEB)	01-03-2019	15:30	MXN	-	50.9
Fed's Mester Speaks on Women in Economics	01-03-2019	0:00	USD	-	-
Wards Total Vehicle Sales (FEB)	01-03-2019	0:00	USD	-	-
Powell speaks on Economic Developments and Longer-Term Challenges	01-03-2019	1:15	USD	-	-
BEA to Release Dec. income/spending & Jan income	01-03-2019	13:30	USD	-	-
PCE Core (MoM) (DEC)	01-03-2019	13:30	USD	-	0.001
PCE Core (YoY) (DEC)	01-03-2019	13:30	USD	-	0.019
PCE Deflator (MoM) (DEC)	01-03-2019	13:30	USD	-	0.001
PCE Deflator (YoY) (DEC)	01-03-2019	13:30	USD	-	0.018
Personal Income (JAN)	01-03-2019	13:30	USD	-	-
Personal Spending (DEC)	01-03-2019	13:30	USD	-	0.004
Real Personal Spending (DEC)	01-03-2019	13:30	USD	-	0.003
Markit US Manufacturing PMI (FEB F)	01-03-2019	14:45	USD	-	53.7
ISM Employment (FEB)	01-03-2019	15:00	USD	-	55.5
ISM Manufacturing (FEB)	01-03-2019	15:00	USD	-	56.6
ISM New Orders (FEB)	01-03-2019	15:00	USD	-	58.2
ISM Prices Paid (FEB)	01-03-2019	15:00	USD	-	49.6
U. of Mich. 1 Yr Inflation (FEB F)	01-03-2019	15:00	USD	-	0.025
U. of Mich. 5-10 Yr Inflation (FEB F)	01-03-2019	15:00	USD	-	0.023
U. of Mich. Current Conditions (FEB F)	01-03-2019	15:00	USD	-	110
U. of Mich. Expectations (FEB F)	01-03-2019	15:00	USD	-	86.2
U. of Mich. Sentiment (FEB F)	01-03-2019	15:00	USD	-	95.5
Fed's Bostic Remarks at Luncheon at Economic Policy Conference	01-03-2019	17:50	USD	-	-
Baker Hughes U.S. Rig Count (MAR 01)	01-03-2019	18:00	USD	-	1047
Fed's Bostic Speaks on the Economic Outlook, Monetary Policy	01-03-2019	18:15	USD	-	-

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