



01 Apr.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,624	0.5 %	13.8 %
BSE SENSEX	38,673	0.3 %	16.3 %
CNX BANK	30,427	0.0 %	25.1 %
CNX MIDCAP	18,259	1.0 %	(4.4) %
CNX SMALLCAP	6,673	0.3 %	(15.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,929	0.8 %	11.2 %
S&P 500	2,834	0.7 %	13.1 %
FTSE 100	7,279	0.6 %	8.1 %
HANG SENG	29,051	1.0 %	15.6 %
NIKKEI	21,206	0.8 %	8.4 %
SHANGHAI COMPOSITE	3,091	3.2 %	25.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.26	0.2 %	(0.3) %
EUR/USD	1.12	(0.1) %	(2.0) %
GBP/USD	1.30	(0.6) %	2.4 %
USD/JPY	110.79	0.3 %	1.1 %
USD/AUD	1.41	(0.1) %	(0.8) %
USD/SGD	1.36	(0.1) %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	1.4 %	29.2 %
Gold(INR/10g)	31,601	(1.0) %	0.2 %
Gold Comex(USD/oz)	1,291	0.1 %	0.0 %
SILVER(INR/1Kg)	37,270	(0.8) %	(2.6) %
Aluminium(USD/MT)	1,897	(0.1) %	2.1 %
Copper(USD/MT)	6,385	0.7 %	9.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	0.0 %	(0.2) %

Global Economy: Consumer sentiment in the US improved by more than initially estimated in the month of March, according to a report released by the University of Michigan on Friday. The report said the consumer sentiment index for March was upwardly revised to 98.4 from the preliminary reading of 97.8. The US Commerce Department said new home sales soared by 4.9% to an annual rate of 667,000 in February from the revised January rate of 636,000. Growth in Chicago-area business activity saw a significant slowdown in the month of March, MNI Indicators revealed in a report. MNI Indicators said its Chicago business barometer fell to 58.7 in March after spiking to 64.7 in February. German unemployment continued its declining trend in March and the jobless rate fell to a record low. The seasonally adjusted unemployment decreased by 7,000 persons, data from the Federal Employment Agency showed.

Global Equities: US stocks saw continued strength amid optimism about the ongoing trade talks between the US and China. In a post on Twitter this morning, Treasury Secretary Steven Mnuchin described the latest round of high-level U.S. trade talks as "constructive."

Indian Economy: The current account deficit widened to 2.5% of GDP in the third quarter of the current fiscal from 2.1% a year ago, primarily on account of a higher trade deficit. The data released by the Controller General of Accounts (CGA) revealed that the central government's fiscal deficit, gap between expenditure and revenue receipts had crossed 134% of the whole year of the revised budget estimate. Portfolio investment recorded net outflow of USD 2.1 billion in third quarter of 2018-19 - as compared with an inflow of \$5.3 billion in corresponding period of last year - on account of net sale in the equity market, the RBI said. India's foreign exchange reserves continued to rise for the third week in a row, adding \$1.029 billion at \$406.667 billion in the week to March 22.

Equity Markets: Domestic stocks ended with modest gains on steady buying demand in index pivots. Undertone remained firm though. In financial year 2018-19, foreign portfolio investors pulled out a net sum of Rs 1,629 crore from equities and Rs 42,951 crore from the bonds market, taking the total net outflow to Rs 44,580 crore, the depositories data showed.

Corporate News: Lyka Labs entered into One Time Settlement agreement with the Bank of Maharashtra and arranged to make an upfront payment of Rs 11 crore as settlement amount and Rs 6.49 lakh as processing fees to the bank. Sadbhav Infrastructure Project acquired further 6 percent (3,000) equity shares of subsidiary Maharashtra Border Check Post Network Limited (MBCPNL), held by SREI. Container Corporation of India said its first distribution logistics centre at Ennore, Chennai was inaugurated on March 30. The government has notified a new accounting standard Ind AS 116 that will bring in more transparency in recognition and disclosures about leases in companies' balance sheets, a senior official said on Sunday, media reports noted. The Indian Accounting Standard (Ind AS) 116 is expected to have a significant impact on various industries, including aviation where airlines mostly operate planes on lease.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	510.3	264.9	0.5
MF(INR cr)	(1,711.2)	(402.1)	343.6

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	49,576	40,958	34,864
F&O(INR cr)	497,595	1,147,016	980,530

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.7	14.5	16.5
NSE VIX	17.2	16.0	15.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,427	0.0 %	25.1 %	Energy	16,484	0.6 %	24.0 %
IT	15,628	0.4 %	23.0 %	Pharma	9,347	1.6 %	8.4 %
Metals	3,044	2.4 %	(14.0) %	Finance	12,544	0.6 %	22.2 %
Auto	8,335	1.2 %	(24.6) %	PSU	3,339	(0.2) %	17.0 %
FMCG	30,321	0.3 %	14.4 %	Real Estate	269	1.0 %	(9.2) %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
S A I L	54	6.0 %	(26.4) %	SBI Life I	583	(5.3) %	(14.7) %
Indiabulls	858	5.8 %	(31.0) %	Bajaj Hold	3,417	(4.9) %	30.3 %
B H E L	75	4.8 %	(9.1) %	GAIL (Indi	348	(3.0) %	7.0 %
DLF	202	4.3 %	0.7 %	IndusInd B	1,780	(2.3) %	(1.4) %
H P C L	284	4.2 %	(17.6) %	Eicher Mot	20,548	(1.7) %	(27.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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