



02 Apr.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,681	0.1 %	0.1 %
BSE SENSEX	38,872	0.5 %	0.1 %
CNX BANK	30,262	(0.2) %	(0.2) %
CNX MIDCAP	18,340	0.0 %	0.0 %
CNX SMALLCAP	6,739	0.0 %	0.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,258	1.3 %	12.6 %
S&P 500	2,867	1.2 %	14.4 %
FTSE 100	7,317	0.5 %	8.7 %
HANG SENG	29,562	1.8 %	17.6 %
NIKKEI	21,509	1.4 %	10.0 %
SHANGHAI COMPOSITE	3,170	2.6 %	28.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.16	0.0 %	(0.4) %
EUR/USD	1.12	(0.3) %	(2.2) %
GBP/USD	1.31	(0.4) %	2.5 %
USD/JPY	111.30	0.8 %	1.5 %
USD/AUD	1.41	(0.3) %	(1.0) %
USD/SGD	1.36	(0.1) %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	2.4 %	32.3 %
Gold(INR/10g)	31,643	0.1 %	0.4 %
Gold Comex(USD/oz)	1,287	(0.3) %	(0.3) %
SILVER(INR/1Kg)	37,326	0.2 %	(2.5) %
Aluminium(USD/MT)	1,888	(0.4) %	1.6 %
Copper(USD/MT)	6,498	1.8 %	11.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	0.1 %	(0.1) %

Global Economy: The US ISM said its purchasing managers index rose to 55.3 in March after falling to 54.2 in February, with a reading above 50 indicating growth in the manufacturing sector. Eurozone manufacturing operating conditions deteriorated in March to the greatest degree for nearly six years, according to the latest PMI data from IHS Markit. The IHS Markit Eurozone Manufacturing PMI posted a level of 47.5, down from 49.3 in February and its lowest level since April 2013. March marked a second successive month that the PMI has posted below the 50.0 no-change mark. Eurozone headline inflation slowed to 1.4% in March from 1.5% in February. Core inflation, which excludes prices of energy, food, alcohol and tobacco, eased to 0.8% in March from 1% in February. UK CIPS PMI for the manufacturing sector climbed to a 13-month high of 55.1 in March from 52.1 in February. Manufacturing sector grew at the fastest pace in over a year in March, as stockpiling by businesses hit a record as they braced for Brexit disruptions. ASEAN manufacturers saw a slight improvement in operating conditions in March, according to the headline Nikkei ASEAN Manufacturing PMI. The headline PMI rose from 49.6 in February to 50.3 in March, moving above the important 50.0 mark that separates growth from contraction.

Global Equities: Stocks eyed the supportive Chinese economic data. China's manufacturing sector returned to growth in March following government efforts to boost the economy. The Caixin/Markit Purchasing Managers' Index (PMI) rose to 50.8 in March from 49.9 in February - hitting eight month high.

Indian Economy: Total Gross GST revenue collected in the month of March, 2019 is Rs. 1,06,577 crore of which CGST is Rs. 20,353 crore, SGST is Rs.27,520 crore, IGST is Rs.50,418 crore (including Rs. 23,521 crore collected on imports) and Cess is Rs. 8,286 crore (including Rs. 891 crore collected on imports). The total number of GSTR 3B Returns filed for the month of February up to 31st March, 2019 is 75.95 lakh. In order to meet the durable liquidity needs of the system, the Reserve Bank has decided to inject Rupee liquidity for longer duration through long-term foreign exchange Buy/Sell swap in terms of its extant Liquidity Management Framework. The US Dollar amount mobilized through this auction would also reflect in RBI's foreign exchange reserves for the tenor of the swap while also reflecting in RBI's forward liabilities. Accordingly, it has been decided to conduct a US\$/INR Buy/Sell swap auction of US\$ 5 billion for tenor of 3 years on 23 April 2019.

Equity Markets: Domestic stocks settled with modest gains on steady buying demand in index pivots. Sentiment was boosted by positive global cues backed by fresh hopes of a progress in China-US trade talks. The barometer index, the S&P BSE Sensex, rose 198.96 points or 0.51% to 38,871.87. The index hit record high of 39,115.57 in intraday trade. The Nifty 50 index rose 31.70 points or 0.27% to 11,655.60.

Corporate News: India is one of the fastest growing entertainment and media territories in the world, with a CAGR of 11.7% from 2017 to 2022, growing from 30,363.72 million USD (19,78,045 million INR) in 2017 to 52,683.15 million USD (34,32,044 million INR) in 2022. It is set to be in the top 10 entertainment and media markets globally by 2021 in terms of absolute numbers, noted an ASSOCHAM-PwC joint study. India's eight core industries grew 2.1% in February 2019. The eight core sectors, which include coal, crude oil, natural gas, refinery products, fertilizers, steel, cement, and electricity, had recorded a growth of 5.4% in February 2018. Coal India Ltd reported a growth of 7% in dry fuel production in 2018-19 to 606.9 million tonne. The production was 567.4 million tonne in FY18. The offtake was at 608.1 million tonne during the year, a growth of 4.8% over the previous fiscal.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	0.0	250.9	0.5
MF(INR cr)	141.6	(401.4)	340.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	41,825	41,825	41,825
F&O(INR cr)	643,894	643,894	643,894

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	13.4	13.4
NSE VIX	18.0	18.0	18.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,327	(0.3) %	0.0 %	Energy	16,532	0.3 %	0.0 %
IT	15,841	1.4 %	0.0 %	Pharma	9,375	0.3 %	0.0 %
Metals	3,102	1.9 %	0.0 %	Finance	12,500	(0.4) %	0.0 %
Auto	8,414	0.9 %	0.0 %	PSU	3,385	1.4 %	0.0 %
FMCG	30,193	(0.4) %	0.0 %	Real Estate	267	(0.7) %	0.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	92	7.9 %	0.0 %	DLF	196	(3.4) %	0.0 %
Tata Motor	187	7.5 %	0.0 %	Shriram Tr	1,236	(3.2) %	0.0 %
Hindalco I	216	5.1 %	0.0 %	Zee Entert	432	(3.1) %	0.0 %
MRF	60,164	3.8 %	0.0 %	Vodafone I	18	(2.7) %	0.0 %
Lupin	766	3.6 %	0.0 %	UPL	934	(2.6) %	0.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AUD Building Approvals (MoM) (FEB)	02-04-2019	00:30	AUD	-	0.025
AUD Building Approvals (YoY) (FEB)	02-04-2019	00:30	AUD	-	(0.286)
AUD RBA Cash Rate Target (APR 02)	02-04-2019	03:30	AUD	-	0.015
AUD AiG Performance of Service Index (MAR)	02-04-2019	21:30	AUD	-	44.5
AUD CBA Australia PMI Composite (MAR F)	02-04-2019	22:00	AUD	-	50
AUD CBA Australia PMI Services (MAR F)	02-04-2019	22:00	AUD	-	49.8
CHF Consumer Price Index (MoM) (MAR)	02-04-2019	06:30	CHF	-	0.004
CHF Consumer Price Index (YoY) (MAR)	02-04-2019	06:30	CHF	-	0.006
CHF CPI Core (YoY) (MAR)	02-04-2019	06:30	CHF	-	0.004
CHF CPI EU Harmonized (MoM) (MAR)	02-04-2019	06:30	CHF	-	0.003
CHF CPI EU Harmonized (YoY) (MAR)	02-04-2019	06:30	CHF	-	0.007
EUR Euro-Zone Producer Price Index (MoM) (FEB)	02-04-2019	09:00	EUR	-	0.004
EUR Euro-Zone Producer Price Index (YoY) (FEB)	02-04-2019	09:00	EUR	-	0.03
GBP Markit/CIPS UK Construction PMI (MAR)	02-04-2019	08:30	GBP	-	49.5
GBP BRC Shop Price Index (YoY) (MAR)	02-04-2019	23:01	GBP	-	0.007
NZD QV House Prices (YoY) (MAR)	02-04-2019	16:00	NZD	-	0.03
USD Cap Goods Orders Nondef Ex Air (FEB P)	02-04-2019	12:30	USD	-	0.008
USD Cap Goods Ship Nondef Ex Air (FEB P)	02-04-2019	12:30	USD	-	0.008
USD Durable Goods Orders (FEB P)	02-04-2019	12:30	USD	-	0.003
USD Durables Ex Transportation (FEB P)	02-04-2019	12:30	USD	-	(0.002)

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