



03 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,219	0.1 %	0.1 %
BSE SENSEX	33,255	0.9 %	0.1 %
CNX BANK	24,411	0.3 %	0.3 %
CNX MIDCAP	19,123	0.1 %	0.1 %
CNX SMALLCAP	7,955	0.3 %	0.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,644	(1.9) %	(4.8) %
S&P 500	2,582	(2.2) %	(4.2) %
FTSE 100	7,057	0.2 %	(7.7) %
HANG SENG	30,093	0.2 %	(1.4) %
NIKKEI	21,389	(0.3) %	(9.0) %
SHANGHAI COMPOSITE	3,163	(0.2) %	(5.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.18	0.3 %	2.4 %
EUR/USD	1.23	(0.8) %	2.6 %
GBP/USD	1.41	(0.8) %	4.1 %
USD/JPY	105.88	0.2 %	(6.1) %
USD/AUD	1.31	0.6 %	2.2 %
USD/SGD	1.31	0.4 %	(1.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	0.9 %	7.6 %
Gold(INR/10g)	30,443	(0.6) %	3.7 %
Gold Comex(USD/oz)	1,327	(0.2) %	1.4 %
SILVER(INR/1Kg)	38,168	(0.4) %	(1.1) %
Aluminium(USD/MT)	1,997	0.0 %	(11.5) %
Copper(USD/MT)	6,685	0.0 %	(6.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	0.0 %	0.3 %

Global Economy: Activity in the US manufacturing sector grew at a slower than expected rate in the month of March, according to a report released by the Institute for Supply Management on Monday. The ISM said its purchasing managers index fell to 59.3 in March from 60.8 in February. Activity in China's factories expanded at the slowest pace in five months in March, a private gauge indicated, in contrast with official data showing manufacturing activity at a three-month high. The Caixin China manufacturing purchasing managers' index dropped to 51.0 in March from 51.6 in February, Caixin Media Co. and research firm Markit said. The 50 level separates an expansion in manufacturing activity from a contraction. New orders grew at the slowest rate in four months, due to muted foreign demand and only a slight improvement in external demand, Caixin said. Production levels rose at the slowest pace since November as a result of lukewarm demand, Caixin said.

Global Equities: US stocks tumbled after a long weekend on trade fears and steep selling in technology stocks. China imposed tariffs on a range of US goods, to retaliate against the Trump administration's penalties on imports of Chinese steel and aluminum.

Indian Economy: The Petroleum & Natural Gas Minister Dharmendra Pradhan said that we decided to proactively advance the roll-out of BS-VI fuel in Delhi from April 2018, instead of April 2020 after taking stock of the alarming pollution situation in Delhi in winters. BS-VI fuel will bring down sulphur by 5 times from the current BS-IV levels - this is an 80 percent reduction which makes it extremely clean. It will improve emissions from the existing fleet, even from the older vehicles on road. BS-VI is as clean as CNG or even cleaner than CNG in some respects Pradhan said today at the launch of BS-VI compliant automotive fuels in Delhi and added we plan to extend the availability of these fuels across the country by 1st April 2020.

Equity Markets: Domestic stocks recorded modest gains in steady session of trade led by index heavyweights HDFC Bank, Kotak Mahindra Bank and Reliance Industries. The Sensex settled above the psychological 33,000 mark after gyrating above and below that level in intraday trade. Auto stocks gained after declaring good monthly sales volume data for March 2018. Trading for the first day of the week, month and financial year 2019 began on a buoyant note as domestic stocks edged higher in early trade on positive Asian stocks.

Corporate News: The combined Index of Eight Core Industries stands at 123.1 in February, 2018, which was 5.3% higher as compared to the index of February, 2017. Its cumulative growth during April to February, 2017-18 was 4.3%. The Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP). Two-wheeler major Hero MotoCorp today reported its highest ever monthly sales, recording 7,30,473 units in March, a 20% spurt over the year-ago period. For the 2017-18 fiscal, the company clocked its highest ever sales of 75,87,130 units, up 14 per cent as compared with sale of 66,64,240 units in 2016-17. More Indian companies are likely to default on their borrowings in the fiscal year that started in April compared with the previous year on higher interest costs and a deterioration in business conditions, according to rating agency ICRA.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	168.8	114.3	13.4
MF(INR cr)	2,235.4	395.4	565.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,392	29,392	29,392
F&O(INR cr)	379,097	379,097	379,097

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.0	18.9	12.4
NSE VIX	15.4	15.4	15.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,329	0.3 %	0.0 %	Energy	13,291	0.6 %	0.0 %
IT	12,707	1.6 %	0.0 %	Pharma	8,621	3.1 %	0.0 %
Metals	3,540	0.8 %	0.0 %	Finance	10,261	0.5 %	0.0 %
Auto	11,058	2.2 %	0.0 %	PSU	2,854	(0.8) %	0.0 %
FMCG	26,501	1.4 %	0.0 %	Real Estate	296	0.8 %	0.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	593	6.2 %	0.0 %	ICICI Bank	262	(5.9) %	0.0 %
Cipla	576	5.6 %	0.0 %	I O C L	170	(3.5) %	0.0 %
Lupin	777	5.6 %	0.0 %	Axis Bank	499	(2.2) %	0.0 %
Oracle Fin	3,938	5.2 %	0.0 %	Coal India	278	(2.0) %	0.0 %
Oil India	227	4.9 %	0.0 %	P & G Hygi	9,392	(1.7) %	0.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ANZ Job Advertisements (MoM) (MAR)	03-04-2018	1:30	AUD	-	(0.003)
ANZ Roy Morgan Weekly Consumer Confidence Index (APR 1)	03-04-2018	23:30	AUD	-	117.4
Commodity Index AUD (MAR)	03-04-2018	6:30	AUD	-	139.8
CoreLogic House Px (MoM) (MAR)	03-04-2018	0:00	AUD	-	(0.003)
RBA Cash Rate Target (APR 3)	03-04-2018	4:30	AUD	-	0.015
RBA Commodity Index SDR (YoY) (MAR)	03-04-2018	6:30	AUD	-	(0.01)
Domestic Sight Deposits CHF (MAR 30)	03-04-2018	8:00	CHF	-	-
PMI Manufacturing (MAR)	03-04-2018	7:30	CHF	-	65.5
Retail Sales Real (YoY) (FEB)	03-04-2018	7:15	CHF	-	(0.014)
Total Sight Deposits CHF (MAR 30)	03-04-2018	8:00	CHF	-	-
German Retail Sales (MoM) (FEB)	03-04-2018	6:00	EUR	-	(0.007)
German Retail Sales (YoY) (FEB)	03-04-2018	6:00	EUR	-	0.023
Markit Eurozone Manufacturing PMI (MAR F)	03-04-2018	8:00	EUR	-	56.6
Markit France Manufacturing PMI (MAR F)	03-04-2018	7:50	EUR	-	53.6
Markit/ADACI Italy Manufacturing PMI (MAR)	03-04-2018	7:45	EUR	-	56.8
Markit/BME Germany Manufacturing PMI (MAR F)	03-04-2018	7:55	EUR	-	58.4
BRC Shop Price Index (YoY) (MAR)	03-04-2018	23:01	GBP	-	(0.008)
Markit UK PMI Manufacturing s.a. (MAR)	03-04-2018	8:30	GBP	-	55.2
ANZ Consumer Confidence (MoM) (MAR)	03-04-2018	22:00	NZD	-	0.006
ANZ Consumer Confidence Index (MAR)	03-04-2018	22:00	NZD	-	127.7
Fed's Brainard Speaks on Financial Stability	03-04-2018	20:30	USD	-	-
Fed's Kashkari Speaks at Regional Economic Forum	03-04-2018	13:30	USD	-	-
U.S. to Sell 4-Week Bills	03-04-2018	15:30	USD	-	-

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