



**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,746	0.3 %	0.7 %
BSE SENSEX	39,057	0.5 %	0.9 %
CNX BANK	30,509	0.5 %	0.6 %
CNX MIDCAP	18,422	0.5 %	0.5 %
CNX SMALLCAP	6,761	0.6 %	0.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,179	(0.3) %	12.2 %
S&P 500	2,867	0.0 %	14.4 %
FTSE 100	7,391	1.0 %	9.8 %
HANG SENG	29,625	0.2 %	17.9 %
NIKKEI	21,505	(0.0) %	9.9 %
SHANGHAI COMPOSITE	3,177	0.2 %	28.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.26	0.2 %	(0.3) %
EUR/USD	1.12	0.2 %	(2.0) %
GBP/USD	1.31	0.1 %	2.6 %
USD/JPY	111.17	(0.1) %	1.4 %
USD/AUD	1.40	(0.1) %	(1.1) %
USD/SGD	1.35	(0.1) %	(0.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	1.6 %	34.5 %
Gold(INR/10g)	31,499	(0.5) %	(0.1) %
Gold Comex(USD/oz)	1,291	0.3 %	0.0 %
SILVER(INR/1Kg)	37,123	(0.5) %	(3.0) %
Aluminium(USD/MT)	1,858	(1.6) %	0.0 %
Copper(USD/MT)	6,431	(1.0) %	10.1 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	(0.0) %	(0.2) %

**Global Economy:** World trade shrank by 0.3% in the fourth quarter of 2018 and is likely to grow by 2.6 percent this year, slower than 3% growth in 2018 and below a previous forecast of 3.7%, the World Trade Organization said. Eurozone industrial producer price index rose 3% in February year-on-year following a 2.9% rise in January, which was revised from 3%. On a month-on-month basis, producer prices edged up 0.1% in February following a 0.3% increase at the start of the year. UK construction activity continued to shrink in March, though the pace eased slightly, driven by sustained weakness in commercial work and civil engineering, survey data from IHS Markit showed. The CIPS construction purchasing managers' index (PMI) edged up to 49.7 in March from 49.5 in February. The Reserve Bank of Australia on Tuesday left its benchmark interest rate unchanged, acknowledging that the labor market continued to be "strong" despite soft economic growth seen late last year. The board of the Reserve Bank of Australia, governed by Philip Lowe, voted to maintain the cash rate at 1.50%. The interest rate has remained at the current level since August 2016.

**Global Equities:** Some cautious moves were seen after recent spurt. UK lawmakers rejected all the options to replace Prime Minister Theresa May's Brexit deal.

**Indian Economy:** India's headline Nikkei manufacturing Purchasing Managers' Index, or PMI, fell to 52.6 in March from 54.3 in February, survey data from IHS Markit showed on Tuesday. Manufacturing growth slowed to a six-month low in March due to softer increases in new orders, production, input buying and employment. A score above 50 indicates expansion in the sector. New order growth was slowest in six-months, as the upturn was curbed by the upcoming elections and competitive conditions. Export demand rose further, albeit at a slower pace.

**Equity Markets:** Domestic stocks settled higher for the fourth straight trading session. Stocks staged a late-afternoon rally on buying demand in index pivots. The Sensex hit record high on intraday and closing basis and ended above the 39,000 mark. The Nifty ended above the 11,700 mark. Broader market declined though. Among secondary barometers, the BSE Mid-Cap index fell 0.04%. The BSE Small-Cap index fell 0.18%.

**Corporate News:** IT counters could be under pressure following the sharp spurt in Indian Rupee. Indian Rupee saw firm moves on strength in local stocks yesterday. INR broke under 69 per US dollar and tested 68.70 level. Karnataka Bank entered into Memorandum of Understanding with Bharti AXA Life Insurance Company for distribution of latter's life insurance products. Indraprastha Gas (IGL) has received three letters dated March 29, 2019 from Petroleum and Natural Gas Regulatory Board (PNGRB) for grant of authorization to the company for development of CGD network in the geographical areas of (i) Kaithal District (ii) Ajmer, Pali and Rajsamand District & (iii) Kanpur (Except area already authorized) District, Fatehpur and Hamirpur Districts.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	1,380.9	1,380.9	1,380.9
MF(INR cr)	(352.9)	(352.9)	(352.9)

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,453	40,639	40,639
F&O(INR cr)	756,602	700,248	700,248

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	13.4	13.4
NSE VIX	18.1	18.0	18.0

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,354	0.1 %	0.1 %	Energy	16,524	(0.1) %	(0.1) %
IT	15,988	0.9 %	0.9 %	Pharma	9,297	(0.8) %	(0.8) %
Metals	3,089	(0.4) %	(0.4) %	Finance	12,539	0.3 %	0.3 %
Auto	8,504	1.1 %	1.1 %	PSU	3,425	1.2 %	1.2 %
FMCG	30,073	(0.4) %	(0.4) %	Real Estate	273	2.3 %	2.3 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	203	8.3 %	8.3 %	Vodafone I	17	(5.6) %	(5.6) %
Tata Motor	98	6.2 %	6.2 %	H P C L	274	(3.5) %	(3.5) %
Bharti Air	356	4.6 %	4.6 %	Zee Entert	418	(3.2) %	(3.2) %
General In	254	3.1 %	3.1 %	Shriram Tr	1,198	(3.1) %	(3.1) %
Eicher Mot	20,584	2.7 %	2.7 %	Godrej Con	657	(3.0) %	(3.0) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AUD Retail Sales (MoM) (FEB)	03-04-2019	00:30	AUD	-	0.001
AUD Trade Balance (FEB)	03-04-2019	00:30	AUD	-	-
CNY Caixin China PMI Composite (MAR)	03-04-2019	01:45	CNY	-	50.7
CNY Caixin China PMI Services (MAR)	03-04-2019	01:45	CNY	-	51.1
EUR Markit/ADACI Italy Composite PMI (MAR)	03-04-2019	07:45	EUR	-	49.6
EUR Markit/ADACI Italy Services PMI (MAR)	03-04-2019	07:45	EUR	-	50.4
EUR Markit France Composite PMI (MAR F)	03-04-2019	07:50	EUR	-	48.7
EUR Markit France Services PMI (MAR F)	03-04-2019	07:50	EUR	-	48.7
EUR Markit Germany Services PMI (MAR F)	03-04-2019	07:55	EUR	-	54.9
EUR Markit/BME Germany Composite PMI (MAR F)	03-04-2019	07:55	EUR	-	51.5
EUR Markit Eurozone Composite PMI (MAR F)	03-04-2019	08:00	EUR	-	51.3
EUR Markit Eurozone Services PMI (MAR F)	03-04-2019	08:00	EUR	-	52.7
EUR Euro-Zone Retail Sales (MoM) (FEB)	03-04-2019	09:00	EUR	-	0.013
EUR Euro-Zone Retail Sales (YoY) (FEB)	03-04-2019	09:00	EUR	-	0.022
GBP Markit/CIPS UK Composite PMI (MAR)	03-04-2019	08:30	GBP	-	51.5
GBP Markit/CIPS UK Services PMI (MAR)	03-04-2019	08:30	GBP	-	51.3
GBP Official Reserves (Changes) (MAR)	03-04-2019	08:30	GBP	-	-
JPY Nikkei Japan PMI Composite (MAR)	03-04-2019	00:30	JPY	-	50.7
JPY Nikkei Japan PMI Services (MAR)	03-04-2019	00:30	JPY	-	52.3
JPY Foreign Buying Japan Bonds (MAR 29)	03-04-2019	23:50	JPY	-	-
JPY Foreign Buying Japan Stocks (MAR 29)	03-04-2019	23:50	JPY	-	-
JPY Japan Buying Foreign Bonds (Yen) (MAR 29)	03-04-2019	23:50	JPY	-	-
JPY Japan Buying Foreign Stocks (Yen) (MAR 29)	03-04-2019	23:50	JPY	-	-
NZD ANZ Commodity Price (MAR)	03-04-2019	00:00	NZD	-	0.028
USD MBA Mortgage Applications (MAR 29)	03-04-2019	11:00	USD	-	0.089
USD ADP Employment Change (MAR)	03-04-2019	12:15	USD	-	-
USD Fed's Bostic Speaks at American Banker Association Summit	03-04-2019	12:30	USD	-	-
USD Markit US Composite PMI (MAR F)	03-04-2019	13:45	USD	-	54.3
USD Markit US Composite PMI (MAR F)	03-04-2019	13:45	USD	-	54.3



USD ISM Non-Manufacturing/Services Composite (MAR)	03-04-2019	14:00	USD	-	59.7
USD DOE Cushing OK Crude Inventory (MAR 29)	03-04-2019	14:30	USD	-	-
USD DOE U.S. Crude Oil Inventories (MAR 29)	03-04-2019	14:30	USD	-	-
USD DOE U.S. Distillate Inventory (MAR 29)	03-04-2019	14:30	USD	-	-
USD DOE U.S. Gasoline Inventories (MAR 29)	03-04-2019	14:30	USD	-	-
USD Fed's Kashkari Speaks in North Dakota	03-04-2019	21:00	USD	-	-

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