



04 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,254	0.1 %	0.4 %
BSE SENSEX	33,371	0.3 %	0.5 %
CNX BANK	24,500	(0.0) %	0.7 %
CNX MIDCAP	19,379	0.6 %	1.5 %
CNX SMALLCAP	8,140	1.0 %	2.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,033	1.7 %	(3.2) %
S&P 500	2,614	1.3 %	(3.0) %
FTSE 100	7,030	(0.4) %	(8.1) %
HANG SENG	30,180	0.3 %	(1.1) %
NIKKEI	21,292	(0.5) %	(9.4) %
SHANGHAI COMPOSITE	3,137	(0.8) %	(6.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.01	0.1 %	2.1 %
EUR/USD	1.23	(1.1) %	2.3 %
GBP/USD	1.41	(0.7) %	4.3 %
USD/JPY	106.53	0.9 %	(5.5) %
USD/AUD	1.30	(0.1) %	1.5 %
USD/SGD	1.31	0.2 %	(1.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(3.0) %	4.4 %
Gold(INR/10g)	30,684	0.8 %	4.5 %
Gold Comex(USD/oz)	1,327	(0.2) %	1.4 %
SILVER(INR/1Kg)	38,315	0.4 %	(0.7) %
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: Eurozone manufacturing Purchasing Managers' Index slipped to 56.6 in March from 58.6 in February, final data from IHS Markit showed Tuesday. The score came in line with flash estimate. This was the lowest score in eight months. Nonetheless, a reading above 50 indicates expansion in the sector. UK manufacturing activity maintained a steady growth in March, survey results from IHS Markit showed Tuesday. The IHS Markit/Chartered Institute of Procurement & Supply manufacturing Purchasing Managers' Index rose slightly to 55.1 in March from 55.0 in February.

Global Equities: European stocks declined and most Asian stocks settled lower as a sell-off in once much-favored US technology shares deepened and volatility soared.

Indian Economy: Growth in domestic manufacturing sector slowed to a five-month low in March. According to the Nikkei Manufacturing Purchasing Managers' Index (PMI) survey, growth in manufacturing activity continued at a low pace of 51 in March, down from 52.1 in the previous month of February. Goods manufacturers raised their output for the eighth successive month during March. However, the degree to which output rose was modest and the weakest since October. Also, due to spare operating capacity, firms reduced their payroll numbers for the first time in eight months, albeit at a fractional pace. Whatever higher production occurred is mainly linked to new order growth and favourable demand conditions, the survey pointed out.

Equity Markets: Local stocks registered modest gains after a volatile trading session led by gains in index pivots ICICI Bank and Reliance Industries. After trading in a small range for most part of the session, stocks staged a comeback in late trade. A bout of volatility was seen in early trade as domestic stocks turned positive soon after a subdued start triggered by negative Asian stocks. Good buying emerged in late trades.

Corporate News: Shares of India's biggest stock broking firm ICICI Securities are scheduled to get listed on BSE and NSE on Wednesday. The domestic pharmaceutical sector is set for a sharp turnaround in the new fiscal year with a 20-22% growth in operating profit - the fastest pace since 2014, while revenue may grow at 9-11%, according to a report from CRISIL. Local IT stocks would be in focus. India has the potential to innovate on the lines of Silicon Valley but it needs to do more for expanding the innovation ecosystem as it aspires to become a middle income country, World Bank India head Junaid Kamal Ahmad stated, according to media reports. Bank stocks could add to their yesterday's gains after the Reserve Bank of India allowed lenders to spread the provisions for bond losses in the third and fourth quarters of FY18 over the next four quarters.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(39.7)	(39.7)	(39.7)
MF(INR cr)	2,235.4	395.4	565.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,018	31,205	31,205
F&O(INR cr)	433,298	406,198	406,198

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	23.6	23.6	23.6
NSE VIX	15.2	15.3	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,511	0.7 %	0.7 %	Energy	13,395	0.8 %	0.8 %
IT	12,615	(0.7) %	(0.7) %	Pharma	8,665	0.5 %	0.5 %
Metals	3,560	0.6 %	0.6 %	Finance	10,311	0.5 %	0.5 %
Auto	11,153	0.9 %	0.9 %	PSU	2,901	1.6 %	1.6 %
FMCG	26,506	0.0 %	0.0 %	Real Estate	298	0.5 %	0.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	1,299	4.4 %	4.4 %	Tech Mahin	616	(3.8) %	(3.8) %
Sun TV Net	894	4.0 %	4.0 %	Oil India	221	(2.6) %	(2.6) %
B H E L	86	3.9 %	3.9 %	Wipro	284	(2.0) %	(2.0) %
NHPC Ltd	29	3.9 %	3.9 %	Hindalco I	208	(1.6) %	(1.6) %
Cummins In	740	3.4 %	3.4 %	O N G C	178	(1.4) %	(1.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Service Index (MAR)	04-04-2018	22:30	AUD	-	54
Building Approvals (MoM) (FEB)	04-04-2018	1:30	AUD	-	0.171
Building Approvals (YoY) (FEB)	04-04-2018	1:30	AUD	-	0.12
CBA Australia PMI Composite (MAR)	04-04-2018	23:00	AUD	-	54.3
CBA Australia PMI Services (MAR)	04-04-2018	23:00	AUD	-	54.2
Retail Sales (MoM) (FEB)	04-04-2018	1:30	AUD	-	0.001
Caixin China PMI Composite (MAR)	04-04-2018	1:45	CNY	-	53.3
Caixin China PMI Services (MAR)	04-04-2018	1:45	CNY	-	54.2
Euro-Zone Consumer Price Index Core (YoY) (MAR A)	04-04-2018	9:00	EUR	-	0.01
Euro-Zone Consumer Price Index Estimate (YoY) (MAR)	04-04-2018	9:00	EUR	-	0.012
Euro-Zone Unemployment Rate (FEB)	04-04-2018	9:00	EUR	-	0.086
Markit/CIPS UK Construction PMI (MAR)	04-04-2018	8:30	GBP	-	51.4
BOJ Outright Bond Purchase 1~3 Years	04-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	04-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	04-04-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (MAR 30)	04-04-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAR 30)	04-04-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAR 30)	04-04-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAR 30)	04-04-2018	23:50	JPY	-	-
Nikkei Japan PMI Composite (MAR)	04-04-2018	0:30	JPY	-	52.2
Nikkei Japan PMI Services (MAR)	04-04-2018	0:30	JPY	-	51.7
ANZ Job Advertisements (MoM) (MAR)	04-04-2018	22:00	NZD	-	(0.012)
QV House Prices (YoY) (MAR)	04-04-2018	17:00	NZD	-	0.065
ADP Employment Change (MAR)	04-04-2018	12:15	USD	-	-
Cap Goods Orders Nondef Ex Air (FEB F)	04-04-2018	14:00	USD	-	0.018
Cap Goods Ship Nondef Ex Air (FEB F)	04-04-2018	14:00	USD	-	0.014
DOE Cushing OK Crude Inventory (MAR 30)	04-04-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAR 30)	04-04-2018	14:30	USD	-	-
DOE U.S. Distillate Fuel Inventory (MAR 30)	04-04-2018	14:30	USD	-	-



DOE U.S. Gasoline Inventories (MAR 30)	04-04-2018	14:30	USD	-	-
Durable Goods Orders (FEB F)	04-04-2018	14:00	USD	-	0.031
Durables Ex Transportation (FEB F)	04-04-2018	14:00	USD	-	0.012
Factory Orders (FEB)	04-04-2018	14:00	USD	-	(0.014)
Factory Orders Ex Trans (FEB)	04-04-2018	14:00	USD	-	0.004
Fed's Bullard Speaks on U.S. Economy and Monetary Policy	04-04-2018	13:45	USD	-	-
Fed's Mester Speaks on Diversity in Economics	04-04-2018	15:00	USD	-	-
ISM Non-Manufacturing/Services Composite (MAR)	04-04-2018	14:00	USD	-	59.5
Markit US Composite PMI (MAR F)	04-04-2018	13:45	USD	-	54.3
Markit US Services PMI (MAR F)	04-04-2018	13:45	USD	-	54.1
MBA Mortgage Applications (MAR 30)	04-04-2018	11:00	USD	-	0.048

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