



04 Apr.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,648	0.0 %	(0.2) %
BSE SENSEX	38,877	(0.5) %	0.1 %
CNX BANK	30,111	0.1 %	(0.7) %
CNX MIDCAP	18,168	0.2 %	(0.9) %
CNX SMALLCAP	6,656	0.1 %	(1.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,218	0.2 %	12.4 %
S&P 500	2,873	0.2 %	14.6 %
FTSE 100	7,418	0.4 %	10.2 %
HANG SENG	29,986	1.2 %	19.3 %
NIKKEI	21,713	1.0 %	11.0 %
SHANGHAI COMPOSITE	3,216	1.2 %	30.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.10	(0.1) %	(0.5) %
EUR/USD	1.12	(0.0) %	(2.2) %
GBP/USD	1.31	0.1 %	2.6 %
USD/JPY	111.37	0.1 %	1.6 %
USD/AUD	1.41	0.5 %	(0.6) %
USD/SGD	1.36	0.0 %	(0.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	(0.2) %	34.2 %
Gold(INR/10g)	31,454	(0.1) %	(0.2) %
Gold Comex(USD/oz)	1,291	(0.1) %	(0.0) %
SILVER(INR/1Kg)	37,183	0.2 %	(2.8) %
Aluminium(USD/MT)	1,865	0.4 %	0.4 %
Copper(USD/MT)	6,483	0.8 %	11.0 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	0.0 %	(0.1) %

**Global Economy:** Growth remains strong across most of developing Asia but is set to moderate this year and next year against the backdrop of slowing global demand and persistent trade tensions, according to a new Asian Development Bank (ADB) report. The ADB forecasts that growth in the region will soften to 5.7% in 2019 and 5.6% in 2020. Developing Asia's growth in 2018 was 5.9%. Excluding the newly industrialized economies, developing Asia is forecast to expand 6.2% in 2019 and a slightly slower 6.1% in 2020. In 2018, growth was 6.4%. In People's Republic Of China (PRC), structural changes in the economy away from industry and towards services and financial tightening as the government seeks to control financial risks will likely see economic growth moderate to 6.3% in 2019 and 6.1% in 2020 from 6.6% in 2018. Slower growth is to be expected as the PRC economy matures. Eurozone retail sales rose 0.4% month-on-month in February. On a year-on-year basis, retail sales rose 2.8% after a 2.20% increase in January. UK service sector shrunk for the first time in over two-and-a-half years. The CIPS/IHS Markit services purchasing managers' index, or PMI fell to 48.9 in March from 51.3 in February.

**Global Equities:** Strong Chinese data supported sentiments. China's services grew at the fastest pace in over a year in March driven by improved demand, and manufacturing also improved, leading to strongest expansion of the private sector in nine months. The Caixin China services Purchasing Managers' Index, or PMI advanced to 54.4 in March from 51.1 in February.

**Indian Economy:** Recent policy measures by the government to improve the investment climate and boost private consumption and investment will help India to lift economic growth in the next two fiscal years, according to a new report ADB. ADB projects gross domestic product (GDP) growth in India to rise to 7.2% in fiscal year (FY) 2020 and reach 7.3% in FY2021, reversing two years of declining growth as reforms to improve the business and investment climate take effect. India's fiscal year starts on 1 April and ends 31 March of the next calendar year.

**Equity Markets:** Key equity indices edged lower on profit booking after four-day gains. The Sensex ended below 39,000 mark and the Nifty ended below 11,700 mark. The market breadth, indicating the overall health of the market, was weak. The barometer index, the S&P BSE Sensex, fell 179.53 points or 0.46% to 38,877.12. The Nifty 50 index fell 69.25 points or 0.59% to 11,643.95.

**Corporate News:** Mahindra & Mahindra announced that it had become the first Indian tractor brand to rollout 3 million tractors. JTL Infra announced its sales volume performance for the financial year ended 31 March 2019. The Company registered its highest ever sales volumes of 50837 MT in the financial year ended 31 March 2019 higher by 58.05% year-on-year from 32166 MT in financial year ended 31 March 2019.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	68.6	724.7	724.7
MF(INR cr)	193.6	(96.6)	(96.6)

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	39,768	40,349	40,349
F&O(INR cr)	980,410	793,636	793,636

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.7	13.5	13.5
NSE VIX	18.8	18.3	18.3

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,093	(0.9) %	(0.8) %	Energy	16,259	(1.6) %	(1.7) %
IT	15,963	(0.2) %	0.8 %	Pharma	9,180	(1.3) %	(2.1) %
Metals	3,085	(0.1) %	(0.6) %	Finance	12,507	(0.3) %	0.1 %
Auto	8,481	(0.3) %	0.8 %	PSU	3,332	(2.7) %	(1.6) %
FMCG	29,969	(0.3) %	(0.7) %	Real Estate	273	(0.3) %	2.0 %

## 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>
General In	263	3.7 %	6.9 %	Vodafone I	16	(5.1) %	(10.4) %
Indiabulls	870	3.6 %	2.7 %	H P C L	261	(4.9) %	(8.2) %
Bandhan Ba	550	3.5 %	3.8 %	B P C L	363	(4.5) %	(7.3) %
Oracle Fin	3,508	2.7 %	3.5 %	NHPC Ltd	25	(3.5) %	(1.8) %
Maruti Suz	7,073	2.7 %	3.4 %	Zee Entert	405	(3.1) %	(6.3) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
AUD AiG Performance of Construction Index (MAR)	04-04-2019	21:30	AUD	-	43.8
CAD Ivey Purchasing Managers Index s.a. (MAR)	04-04-2019	14:00	CAD	-	50.6
EUR German Factory Orders (MoM) (FEB)	04-04-2019	06:00	EUR	-	(0.026)
EUR German Factory Orders n.s.a. (YoY) (FEB)	04-04-2019	06:00	EUR	-	(0.039)
EUR Markit Germany Construction PMI (MAR)	04-04-2019	07:30	EUR	-	54.7
EUR ECB Publishes Account of March Meeting (MAR)	04-04-2019	11:30	EUR	-	-
JPY Overall Household Spending (YoY) (FEB)	04-04-2019	23:30	JPY	-	0.02
MXN Consumer Confidence Index (MAR)	04-04-2019	14:00	MXN	-	116.8
USD Challenger Job Cuts (YoY) (MAR)	04-04-2019	11:30	USD	-	1.172
USD Continuing Claims (MAR 23)	04-04-2019	12:30	USD	-	-
USD Initial Jobless Claims (MAR 30)	04-04-2019	12:30	USD	-	-
USD EIA Working Natural Gas Implied Flow (MAR 29)	04-04-2019	14:30	USD	-	(36)
USD U.S. to Sell 4-Week Bills	04-04-2019	15:30	USD	-	-
USD U.S. to Sell 8-Week Bills	04-04-2019	15:30	USD	-	-
USD Fed's Mester Speaks at Banking Conference	04-04-2019	17:00	USD	-	-

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