



05 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,458	(0.3) %	13.2 %
BSE SENSEX	34,047	(0.4) %	13.8 %
CNX BANK	24,903	(0.8) %	15.6 %
CNX MIDCAP	19,512	(0.8) %	12.6 %
CNX SMALLCAP	8,340	(0.2) %	17.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,538	(0.3) %	(1.2) %
S&P 500	2,691	0.5 %	(0.2) %
FTSE 100	7,070	(1.5) %	(7.6) %
HANG SENG	30,583	(1.5) %	0.2 %
NIKKEI	21,182	(2.5) %	(9.9) %
SHANGHAI COMPOSITE	3,255	(0.6) %	(2.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.17	(0.0) %	2.3 %
EUR/USD	1.23	0.7 %	2.2 %
GBP/USD	1.38	0.3 %	2.0 %
USD/JPY	106.00	(0.7) %	(6.0) %
USD/AUD	1.29	(0.4) %	0.8 %
USD/SGD	1.32	(0.3) %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	0.4 %	1.5 %
Gold(INR/10g)	30,269	0.0 %	3.1 %
Gold Comex(USD/oz)	1,323	0.5 %	1.1 %
SILVER(INR/1Kg)	38,010	0.0 %	(1.5) %
Aluminium(USD/MT)	2,144	0.0 %	(5.0) %
Copper(USD/MT)	6,883	0.0 %	(4.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

Global Economy: Consumer sentiment in the US improved by slightly less than initially estimated in the month of February, according to a report released by the University of Michigan on Friday. The report said the final reading on the consumer sentiment index for February came in at 99.7 compared to the initial estimate of 99.9. Despite the downward revision, the consumer sentiment index for February is still well above the final January reading of 95.7. Indicating an unexpected acceleration in the pace of growth in the U.S. manufacturing sector, the Institute for Supply Management released a report on Thursday showing its index of activity in the sector rose to a nearly fourteen-year high in February. The ISM said its purchasing managers index climbed to 60.8.

Global Equities: The undertone in world markets is likely to be weary. The International Monetary Fund said on Friday that the US import tariffs on steel and aluminum cause damage to both the United States and its trading partners. US President Donald Trump had imposed 25% tariff on imported steel and 10% on imported aluminum.

Indian Economy: The Union Cabinet chaired by the Prime Minister Narendra Modi has approved the proposal for establishment of National Financial Reporting Authority (NFRA) and creation of one post of Chairperson, three posts of full-time Members and one post of Secretary for NFRA. The decision aims at establishment of NFRA as an independent regulator for the auditing profession which is one of the key changes brought in by the Companies Act, 2013. The inclusion of the provision in the Act was on the specific recommendations of the Standing Committee on Finance (in its 21st report). The decision is expected to result in improved foreign/domestic investments, enhancement of economic growth, supporting the globalisation of business by meeting international practices, and assist in further development of audit profession.

Equity Markets: Local stocks slipped in last session on weak global cues. The selling pressure was restrained as India's positive economic data showed a sign of an overall recovery. Selling in metals and banks shares put pressure on bourses. The market declined for the third straight trading session. The Sensex, and the Nifty, both, ended at their lowest closing levels in one week.

Corporate News: The Indian Media & Entertainment (M&E) sector has seen a 13% growth in the last year to reach Rs 1.5 trillion, according to a latest FICCI-EY report, 'Reimagining India's M&E sector'. The report forecasts that given the current growth trajectory, the sector is expected to cross Rs 2 trillion by 2020 at a CAGR of 11.6%. TVS Motor Company recorded a sales growth of 37% increasing from 211,470 units in February 2017 to 290,673 units in the month of February 2018. Domestic miner NMDC could be in focus after it cut prices of lump ore & fines by Rs 100 per tonne for March 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(264.0)	(107.3)	5.2
MF(INR cr)	1,673.3	779.1	562.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	31,913	31,913	33,412
F&O(INR cr)	1,318,649	1,318,649	652,836

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.6	19.6	11.9
NSE VIX	14.1	14.1	12.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,903	(0.8) %	15.6 %	Energy	13,961	(0.2) %	18.1 %
IT	12,769	(0.3) %	20.6 %	Pharma	8,918	(0.5) %	(15.1) %
Metals	3,961	(0.8) %	27.5 %	Finance	10,373	(0.6) %	17.5 %
Auto	11,147	(0.1) %	12.4 %	PSU	3,021	(1.9) %	(14.3) %
FMCG	26,492	(0.1) %	12.1 %	Real Estate	325	(0.7) %	48.2 %

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>
B P C L	442	2.9 %	3.8 %	Hind.Zinc	316	(3.3) %	8.2 %
NHPC Ltd	28	1.8 %	(13.8) %	Motherson	320	(3.1) %	27.8 %
Aurobindo	624	1.7 %	(8.6) %	S A I L	81	(2.8) %	28.2 %
Colgate-Pa	1,057	1.5 %	5.0 %	ICICI Bank	305	(2.6) %	17.0 %
GlaxoSmith	6,792	1.4 %	31.0 %	Petronet L	241	(2.6) %	16.3 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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