



05 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,846	(0.2) %	6.2 %
BSE SENSEX	36,064	0.5 %	8.4 %
CNX BANK	27,043	(0.0) %	11.2 %
CNX MIDCAP	17,057	0.6 %	(10.7) %
CNX SMALLCAP	6,143	0.8 %	(22.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,820	(0.8) %	10.7 %
S&P 500	2,793	(0.4) %	11.4 %
FTSE 100	7,134	0.4 %	5.9 %
HANG SENG	28,960	0.5 %	15.2 %
NIKKEI	21,822	1.0 %	11.6 %
SHANGHAI COMPOSITE	3,028	1.1 %	22.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.91	0.2 %	2.1 %
EUR/USD	1.13	(0.3) %	(1.0) %
GBP/USD	1.32	(0.7) %	3.4 %
USD/JPY	111.88	0.2 %	2.1 %
USD/AUD	1.41	0.4 %	(0.6) %
USD/SGD	1.36	0.3 %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.4 %	21.6 %
Gold(INR/10g)	32,819	(1.3) %	4.1 %
Gold Comex(USD/oz)	1,289	(2.7) %	(0.1) %
SILVER(INR/1Kg)	39,195	(1.7) %	2.4 %
Aluminium(USD/MT)	1,891	(0.1) %	1.7 %
Copper(USD/MT)	6,572	0.6 %	12.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	(0.4) %	(0.3) %

Global Economy: Worldwide PMI surveys indicated that manufacturing more or less stagnated in February, with growth of business activity dropping to a 33-month low amid a faster decline of global trade flows. Export sales fell for a sixth straight month, with the rate of decrease accelerating. The headline JPMorgan Global Manufacturing PMI, compiled by IHS Markit, fell from 50.8 in January to 50.6 in February, its lowest since June 2016. Growth in the US manufacturing sector slowed in the month of February, according to a report released by the Institute for Supply Management. The ISM said its purchasing managers index (PMI) dropped to 54.2 in February after rising to 56.6 in January. A reading above 50 still indicates growth in the manufacturing sector though. Consumer sentiment in the US rebounded by much less than initially estimated in the month of February, revised data from the University of Michigan revealed. The consumer sentiment index for February was downwardly revised to 93.8 from a preliminary reading of 95.5. The index is still well above the final January reading of 91.2. A private survey on China's manufacturing sector showed that factory activity shrank for a third straight month in February. The Caixin/Markit Manufacturing PMI came in at 49.9 for February – higher than January's reading of 48.3 but within the contraction zone. Eurozone inflation accelerated in February, while core price growth eased, suggesting that price growth pressures remain muted in the 19-nation economy, causing concern for the European Central Bank that is set to hold its policy session next week. The flash harmonized inflation for February was 1.5%, slightly higher than January's 1.4%. Germany's unemployment declined sharply in February, while retail sales rebounded strongly in January, both surpassing economists' expectations by wide margins.

Global Equities: Equities stayed broadly supported. Risk sentiment improved as data showed the US economy grew faster than expected. Markets also focus on media reports noting that the US and China are making progress in their trade negotiations

Indian Economy: The RBI has introduced a separate scheme called 'Voluntary Retention Route' (VRR) to encourage Foreign Portfolio Investors (FPIs) to undertake long-term investments in Indian debt markets. Under this scheme, FPIs have been given greater operational flexibility in terms of instrument choices besides exemptions from certain regulatory requirements. Total GST Revenue collection of Rs 97247 crore for the month of February 2019 Gross GST revenue collection stood at Rs 97247 crore in February 2019, of which CGST is Rs 17626 crore, SGST is Rs 24192 crore, IGST is Rs 46953 crore (including Rs 21384 crore collected on imports) and Cess is Rs 8476 crore (including Rs 910 crore collected on imports).

Equity Markets: Local stocks logged modest gains in steady session of trade on Friday. The Sensex settled above the psychological 36,000 level after moving above and below that level in opening trade. Positive global stocks boosted sentiment.

Corporate News: Bharat Heavy Electricals Ltd is setting up a network of solar-based electric vehicle chargers on the Delhi-Chandigarh highway. Mishra Dhatu Nigam (MIDHANI) has secured one order worth about Rs. 475 crore. The cumulative order booking during the Financial Year 2018-19 is about Rs. 1800 crore. Jet Airways (India) announced that an additional two aircrafts have been grounded due to non-payment of amounts outstanding to lessor under their respective lease agreements.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	121.4	107.6	(20.6)
MF(INR cr)	(355.1)	351.0	423.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,024	39,024	34,376
F&O(INR cr)	405,111	405,111	964,204

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.6	13.6	16.6
NSE VIX	16.3	16.3	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,044	0.9 %	11.2 %	Energy	14,858	0.3 %	11.8 %
IT	15,848	0.7 %	24.7 %	Pharma	8,973	1.0 %	4.1 %
Metals	2,923	1.8 %	(17.4) %	Finance	11,308	0.7 %	10.2 %
Auto	8,414	0.7 %	(23.9) %	PSU	2,832	2.6 %	(0.8) %
FMCG	29,465	0.7 %	11.2 %	Real Estate	230	0.0 %	(22.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
SAIL	52	8.5 %	(28.3) %	Bharti Air	308	(3.3) %	(22.1) %
Bank of Ba	108	7.0 %	(23.8) %	Bosch	18,750	(1.5) %	1.3 %
SBI Life I	608	5.1 %	(11.1) %	Marico	335	(1.4) %	2.0 %
Aditya Bir	96	4.4 %	(36.8) %	Motherson	161	(1.3) %	(25.6) %
Zee Entert	486	4.2 %	(16.0) %	Bajaj Auto	2,864	(1.3) %	1.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Current Account Balance (Australian Dollar) (4Q)	05-03-2019	00:30	AUD	-	-
Net Exports of Gross Domestic Product (4Q)	05-03-2019	00:30	AUD	-	0.4
RBA Cash Rate Target (MAR 05)	05-03-2019	03:30	AUD	-	0.015
RBA Governor Lowe gives speech in Sydney	05-03-2019	22:10	AUD	-	-
Consumer Price Index (MoM) (FEB)	05-03-2019	07:30	CHF	-	(0.003)
Consumer Price Index (YoY) (FEB)	05-03-2019	07:30	CHF	-	0.006
Consumer Price Index Core (YoY) (FEB)	05-03-2019	07:30	CHF	-	0.005
CPI EU Harmonized (MoM) (FEB)	05-03-2019	07:30	CHF	-	(0.006)
CPI EU Harmonized (YoY) (FEB)	05-03-2019	07:30	CHF	-	0.007
Caixin China PMI Composite (FEB)	05-03-2019	01:45	CNY	-	50.9
Caixin China PMI Services (FEB)	05-03-2019	01:45	CNY	-	53.6
Markit/ADACI Italy Composite PMI (FEB)	05-03-2019	08:45	EUR	-	48.8
Markit/ADACI Italy Services PMI (FEB)	05-03-2019	08:45	EUR	-	49.7
Markit France Composite PMI (FEB F)	05-03-2019	08:50	EUR	-	49.9
Markit France Services PMI (FEB F)	05-03-2019	08:50	EUR	-	49.8
Markit Germany Services PMI (FEB F)	05-03-2019	08:55	EUR	-	55.1
Markit/BME Germany Composite PMI (FEB F)	05-03-2019	08:55	EUR	-	52.7
Italian Gross Domestic Product w.d.a. (QoQ) (4Q F)	05-03-2019	09:00	EUR	-	(0.002)
Italian Gross Domestic Product w.d.a. (YoY) (4Q F)	05-03-2019	09:00	EUR	-	0.001
Markit Eurozone Composite PMI (FEB F)	05-03-2019	09:00	EUR	-	51.4
Markit Eurozone Services PMI (FEB F)	05-03-2019	09:00	EUR	-	52.3
Euro-Zone Retail Sales (MoM) (JAN)	05-03-2019	10:00	EUR	-	(0.016)
Euro-Zone Retail Sales (YoY) (JAN)	05-03-2019	10:00	EUR	-	0.008
BRC Sales Like-For-Like (YoY) (FEB)	05-03-2019	00:01	GBP	-	0.018
New Car Registrations (YoY) (FEB)	05-03-2019	09:00	GBP	-	(0.016)
Financial Policy Committee minutes from Feb. 26 meeting (FEB 26)	05-03-2019	09:30	GBP	-	-
Markit/CIPS UK Composite PMI (FEB)	05-03-2019	09:30	GBP	-	50.3
Markit/CIPS UK Services PMI (FEB)	05-03-2019	09:30	GBP	-	50.1
Official Reserve (China) (FEB)	05-03-2019	00:00	CNY	-	-



BOE Governor Mark Carney Testifies to House of Lords	05-03-2019	15:35	GBP	-	-
Nikkei Japan PMI Composite (FEB)	05-03-2019	00:30	JPY	-	50.9
Nikkei Japan PMI Services (FEB)	05-03-2019	00:30	JPY	-	51.6
Consumer Confidence Index (FEB)	05-03-2019	14:00	MXN	-	111.9
ANZ Commodity Price (FEB)	05-03-2019	00:00	NZD	-	0.021
QV House Prices (YoY) (FEB)	05-03-2019	16:00	NZD	-	0.029
Fed's Kashkari Testifies Before Minnesota Senate Finance Panel	05-03-2019	14:30	USD	-	-
Markit US Composite PMI (FEB F)	05-03-2019	14:45	USD	-	55.8
Markit US Services PMI (FEB F)	05-03-2019	14:45	USD	-	56.2
ISM Non-Manufacturing/Services Composite (FEB)	05-03-2019	15:00	USD	-	56.7
New Home Sales (DEC)	05-03-2019	15:00	USD	-	-
New Home Sales (MoM) (DEC)	05-03-2019	15:00	USD	-	0.169
Fed's Barkin Speaks at the Rural Economy	05-03-2019	16:30	USD	-	-
Monthly Budget Statement (JAN)	05-03-2019	19:00	USD	-	-

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