



06 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,422	0.6 %	12.8 %
BSE SENSEX	33,747	(0.9) %	13.6 %
CNX BANK	25,007	0.8 %	16.1 %
CNX MIDCAP	19,494	0.9 %	12.5 %
CNX SMALLCAP	8,341	1.1 %	17.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,875	1.4 %	0.2 %
S&P 500	2,721	1.1 %	0.9 %
FTSE 100	7,116	0.7 %	(7.0) %
HANG SENG	29,886	(2.3) %	(2.1) %
NIKKEI	21,042	(0.7) %	(10.5) %
SHANGHAI COMPOSITE	3,257	0.1 %	(2.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.11	(0.1) %	2.3 %
EUR/USD	1.24	1.3 %	2.9 %
GBP/USD	1.38	0.7 %	2.5 %
USD/JPY	106.41	(0.3) %	(5.6) %
USD/AUD	1.29	(0.7) %	0.5 %
USD/SGD	1.32	(0.7) %	(1.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	0.4 %	1.5 %
Gold(INR/10g)	30,488	0.7 %	3.8 %
Gold Comex(USD/oz)	1,323	0.5 %	1.1 %
SILVER(INR/1Kg)	38,440	1.1 %	(0.4) %
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: Activity in the US service sector grew at a slightly slower rate in the month of February, according to a report released by the Institute for Supply Management on Monday. The ISM said its non-manufacturing index edged down to 59.5 in February from 59.9 in January. Eurozone composite output index dropped to 57.1 from January's near 12-year high of 58.8, final data from IHS Markit showed Monday. The flash reading was 57.5. The headline index has signaled expansion in each of the past 56 months, although the latest reading was slightly below the flash estimate of 57.5. The services Purchasing Managers' Index came in at 56.2 in February, down from January's near ten-and-a-half year high of 58.0 and the flash estimate of 56.7. UK service sector activity expanded at the fastest pace in four months in February, survey data from IHS Markit showed Monday. The IHS Markit/Chartered Institute of Procurement & Supply Purchasing Managers' Index, rose to 54.5 in February from 53.0 in January.

Global Equities: European stocks edged higher amid initial volatility after an uncertain Italian election result left the country preparing for the prospect of a hung parliament.

Indian Economy: After reviewing the current and evolving liquidity conditions in the banking system it has been decided to conduct additional variable rate repo operations for longer tenors to provide additional liquidity support to the banks during March 2018. Accordingly, Reserve Bank of India will conduct 4 variable rate Term Repo auctions in March 2018. These auctions will be conducted in addition to the regular 14 day variable rate Term Repo auctions.

Equity Markets: Local shares extended declines. Stock registered modest losses as investors' sentiment was hit after a private survey data showed deterioration in India's services sector last month. The Sensex closed below the 34,000 level after falling below that level in early trade. The market declined for the fourth straight trading session. The Sensex settled at its lowest closing levels in almost two weeks. The Nifty settled at its lowest closing levels in more than 11 weeks.

Corporate News: With deterioration in business conditions, the Nikkei India Services Business Activity Index fell to a seven-month low of 47.8 in February. It stood at 51.7 in January. With the decline in services activity, the Nikkei India Composite PMI Output Index fell to 49.7 in February from 52.5 in January. A reading above 50 on the index indicates expansion, while one less than that shows decline. According to the survey, there was a modest fall in new business. But, firms remained confident about output growth over the next 12 months as jobs growth quickened to the joint-fastest since June 2011. Country's largest carmaker Maruti Suzuki India said its highest selling model Alto has crossed the 35 lakh cumulative sales milestone. Metal and mining stocks could extend their slide on fears that US President Donald Trump's announced tariffs on steel and aluminum could spark a trade war. Sandu Pharmaceuticals announced that CRISIL has rated the company's bank facilities as CRISIL BB/ Stable ratings.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	65.0	65.0	5.5
MF(INR cr)	0.0	0.0	559.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,557	32,235	33,409
F&O(INR cr)	477,604	898,126	652,071

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.6	19.6	11.9
NSE VIX	15.4	14.7	12.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,819	(0.3) %	15.2 %	Energy	13,686	(2.0) %	15.8 %
IT	12,858	0.7 %	21.4 %	Pharma	8,856	(0.7) %	(15.7) %
Metals	3,831	(3.3) %	23.3 %	Finance	10,338	(0.3) %	17.1 %
Auto	10,972	(1.6) %	10.6 %	PSU	3,023	0.1 %	(14.3) %
FMCG	26,165	(1.2) %	10.7 %	Real Estate	322	(1.0) %	46.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tech Mahin	631	3.1 %	39.2 %	NMDC	123	(6.0) %	(8.1) %
Sun Pharma	549	2.5 %	(20.8) %	Tata Motor	352	(5.0) %	(25.2) %
Shriram Tr	1,369	2.3 %	24.0 %	Hindalco I	230	(4.7) %	18.6 %
TCS	3,106	2.2 %	28.8 %	JSW Steel	292	(4.5) %	54.4 %
Torrent Ph	1,367	2.1 %	(9.2) %	Piramal En	2,441	(4.2) %	26.1 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (FEB)	06-03-2018	21:30	AUD	-	54.3
Current Account Balance (Australian Dollar) (4Q)	06-03-2018	0:30	AUD	-	-
Net Exports of Gross Domestic Product (4Q)	06-03-2018	0:30	AUD	-	0
RBA Cash Rate Target (MAR 6)	06-03-2018	3:30	AUD	-	0.015
RBA Governor Lowe Gives Speech in Sydney	06-03-2018	21:35	AUD	-	-
Retail Sales (MoM) (JAN)	06-03-2018	0:30	AUD	-	(0.005)
Ivey Purchasing Managers Index s.a. (FEB)	06-03-2018	15:00	CAD	-	55.2
Consumer Price Index (MoM) (FEB)	06-03-2018	8:15	CHF	-	(0.001)
Consumer Price Index (YoY) (FEB)	06-03-2018	8:15	CHF	-	0.007
Consumer Price Index EU Harmonized (MoM) (FEB)	06-03-2018	8:15	CHF	-	(0.005)
Consumer Price Index EU Harmonized (YoY) (FEB)	06-03-2018	8:15	CHF	-	0.008
Markit Eurozone Retail PMI (FEB)	06-03-2018	9:10	EUR	-	50.8
Markit France Retail PMI (FEB)	06-03-2018	9:10	EUR	-	51
Markit Germany Construction PMI (FEB)	06-03-2018	8:30	EUR	-	59.8
Markit Germany Retail PMI (FEB)	06-03-2018	9:10	EUR	-	53
Markit Italy Retail PMI (FEB)	06-03-2018	9:10	EUR	-	47.3
BOE's Haldane Speaks at Event in London	06-03-2018	18:15	GBP	-	-
BRC Sales Like-For-Like (YoY) (FEB)	06-03-2018	0:01	GBP	-	0.006
Official Reserve Assets (FEB)	06-03-2018	23:50	JPY	-	-
QV House Prices (YoY) (FEB)	06-03-2018	16:00	NZD	-	0.064
Volume of All Buildings SA (QoQ) (4Q)	06-03-2018	21:45	NZD	-	0.027
Cap Goods Orders Nondef Ex Air (JAN F)	06-03-2018	15:00	USD	-	(0.002)
Cap Goods Ship Nondef Ex Air (JAN F)	06-03-2018	15:00	USD	-	0.001
Durable Goods Orders (JAN F)	06-03-2018	15:00	USD	-	(0.037)
Durables Ex Transportation (JAN F)	06-03-2018	15:00	USD	-	(0.003)
Factory Orders (JAN)	06-03-2018	15:00	USD	-	0.017
Factory Orders Ex Trans (JAN)	06-03-2018	15:00	USD	-	0.007
Fed's Dudley Speaks at U.S. Virgin Islands	06-03-2018	12:30	USD	-	-
U.S. Fed's Williams Speaks	06-03-2018	16:00	USD	-	-



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