



07 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,249	(1.1) %	10.9 %
BSE SENSEX	33,317	(1.3) %	11.4 %
CNX BANK	24,448	(1.5) %	13.5 %
CNX MIDCAP	19,098	(1.2) %	10.2 %
CNX SMALLCAP	8,135	(1.4) %	15.0 %

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	30,511	2.1 %	(0.0) %
NIKKEI	21,418	1.8 %	(8.9) %
SHANGHAI COMPOSITE	3,290	1.0 %	(1.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.11	(0.1) %	2.3 %
EUR/USD	1.24	0.7 %	2.9 %
GBP/USD	1.38	0.5 %	2.5 %
USD/JPY	106.41	0.4 %	(5.6) %
USD/AUD	1.29	(0.3) %	0.5 %
USD/SGD	1.32	(0.4) %	(1.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	2.2 %	3.6 %
Gold(INR/10g)	30,438	(0.2) %	3.7 %
Gold Comex(USD/oz)	1,323	0.0 %	1.1 %
SILVER(INR/1Kg)	38,477	0.1 %	(0.3) %
Aluminium(USD/MT)	2,135	(0.4) %	(5.4) %
Copper(USD/MT)	6,850	(0.5) %	(4.6) %

FIXED INCOME

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

Global Economy: New orders for US manufactured goods slumped by slightly more than expected in the month of January, according to a report released by the Commerce Department on Tuesday. The Commerce Department said factory orders tumbled by 1.4% in January after jumping by an upwardly revised 1.8% in December. Consumer price inflation in the OECD area slowed for the second straight month in January, though marginally. Annual Inflation eased to 2.2% in January from 2.3% in December.

Global Equities: US and European markets saw steady moves with a weak US dollar keeping commodities mostly supported.

Indian Economy: Robust domestic demand is likely to compensate for slowing exports and support stable outlook for large consumption-driven sectors (auto and pharmaceutical) in FY19, says India Ratings and Research (Ind-Ra), according to media reports. Ind-Ra has continued to maintain a stable outlook for the auto and pharmaceutical sectors for FY19. Ind-Ra expects favourable demographics and inflation mix to boost private final consumption expenditure and drive a broad-based, healthy recovery in domestic demand in FY19 (FY19: A Year of Upside). In view of this, the agency expects steady volume growth in the passenger vehicle and two-wheeler segments.

Equity Markets: A bout of late correction hit local stock market in last session. Indices registered sharp losses on worries over the health of the Indian banking sector in the aftermath of a massive financial fraud at Punjab National Bank (PNB). The Sensex closed below the 34,000 level. The market declined for the fifth straight trading session. The Sensex and the Nifty, both, settled at their lowest closing levels in almost 12 weeks. Bank stocks tumbled on reports that the Serious Fraud Investigation Office summoned ICICI Bank MD & CEO Chanda Kochhar and Axis Bank MD Shikha Sharma in the Rs 12800-crore Punjab National Bank (PNB) fraud case.

Corporate News: TCS has extended its strategic partnership with Virgin Atlantic, a leading UK-based global airline, for a further five years. TCS and Virgin Atlantic began working together in 2004 as part of Virgin Atlantic's ongoing strategy to invest in operational efficiencies and innovations to help the company grow its market leadership. HCL Technologies has signed a significant IT deal with the Norway based global energy company StatKraft. Ashoka Buildcon announced that the Company's subsidiary viz. Ashoka Concessions ('ACL') has received a Letter of Award (LOA) from National Highways Authority of India ('NHAI') for the Project viz. Six Laning of Khairatunda to Barwa Adda Section of NH-2. The accepted Bid Project Cost is Rs.860.10 crore. Reliance Communications (Rcom) has moved the Bombay High Court against an arbitration order passed a day before that had "restrained" the telco from selling or transferring its assets without its permission.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(52.9)	6.0	5.2
MF(INR cr)	0.0	0.0	559.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	6,312	23,594	33,290
F&O(INR cr)	715,138	837,130	652,345

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.7	19.2	11.9
NSE VIX	16.3	15.2	12.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,448	(1.5) %	13.5 %	Energy	13,582	(0.8) %	14.9 %
IT	12,706	(1.2) %	20.0 %	Pharma	8,750	(1.2) %	(16.7) %
Metals	3,817	(0.4) %	22.9 %	Finance	10,201	(1.3) %	15.6 %
Auto	10,821	(1.4) %	9.1 %	PSU	2,936	(2.9) %	(16.7) %
FMCG	25,892	(1.0) %	9.5 %	Real Estate	314	(2.3) %	43.4 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
B P C L	445	2.5 %	4.6 %	United Spi	3,029	(5.1) %	48.0 %
Glenmark P	561	1.7 %	(34.6) %	Container	1,236	(3.5) %	22.2 %
Sun TV Net	927	1.6 %	16.5 %	Sun Pharma	532	(3.1) %	(23.2) %
Zee Entert	560	1.4 %	5.9 %	S A I L	76	(2.9) %	20.0 %
UltraTech	4,150	1.3 %	3.1 %	Piramal En	2,370	(2.9) %	22.4 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Foreign Reserves (Australian dollar) (FEB)	07-03-2018	5:30	AUD	-	-
Gross Domestic Product (QoQ) (4Q)	07-03-2018	0:30	AUD	-	0.006
Gross Domestic Product (YoY) (4Q)	07-03-2018	0:30	AUD	-	0.028
Bank of Canada Rate Decision (MAR 7)	07-03-2018	15:00	CAD	-	0.0125
International Merchandise Trade (Canadian dollar) (JAN)	07-03-2018	13:30	CAD	-	-
Labor Productivity (QoQ) (4Q)	07-03-2018	13:30	CAD	-	(0.006)
Foreign Currency Reserves (FEB)	07-03-2018	8:00	CHF	-	-
Euro-Zone Government Expenditure (QoQ) (4Q)	07-03-2018	10:00	EUR	-	0.002
Euro-Zone Gross Domestic Product s.a. (QoQ) (4Q F)	07-03-2018	10:00	EUR	-	0.006
Euro-Zone Gross Domestic Product s.a. (YoY) (4Q F)	07-03-2018	10:00	EUR	-	0.027
Euro-Zone Gross Fixed Capital (QoQ) (4Q)	07-03-2018	10:00	EUR	-	0.011
Euro-Zone Household Consumption (QoQ) (4Q)	07-03-2018	10:00	EUR	-	0.003
Halifax House Price 3Mths/Year (FEB)	07-03-2018	8:30	GBP	-	0.022
Halifax House Prices (MoM) (FEB)	07-03-2018	8:30	GBP	-	(0.006)
Adjusted Current Account Total (Yen) (JAN)	07-03-2018	23:50	JPY	-	-
Bank Lending Ex-Trusts (YoY) (FEB)	07-03-2018	23:50	JPY	-	0.023
Bank Lending incl Trusts (YoY) (FEB)	07-03-2018	23:50	JPY	-	0.024
BOJ Outright Bond Purchase 1~3 Years	07-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	07-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	07-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	07-03-2018	1:10	JPY	-	-
BoP Current Account Balance (JAN)	07-03-2018	23:50	JPY	-	-
Coincident Index (JAN P)	07-03-2018	5:00	JPY	-	120.2
Foreign Buying Japan Bonds (MAR 2)	07-03-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAR 2)	07-03-2018	23:50	JPY	-	-
Gross Domestic Product Annualized s.a. (QoQ) (4Q F)	07-03-2018	23:50	JPY	-	0.005
Gross Domestic Product Business Spending (QoQ) (4Q F)	07-03-2018	23:50	JPY	-	0.007
Gross Domestic Product Deflator (YoY) (4Q F)	07-03-2018	23:50	JPY	-	0
Gross Domestic Product Private Consumption (QoQ) (4Q F)	07-03-2018	23:50	JPY	-	0.005



Gross Domestic Product s.a. (QoQ) (4Q F)	07-03-2018	23:50	JPY	-	0.001
Japan Buying Foreign Bonds (Yen) (MAR 2)	07-03-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAR 2)	07-03-2018	23:50	JPY	-	-
Leading Index CI (JAN P)	07-03-2018	5:00	JPY	-	107.4
Nominal Gross Domestic Product (QoQ) (4Q F)	07-03-2018	23:50	JPY	-	0
Trade Balance - BOP Basis (Yen) (JAN)	07-03-2018	23:50	JPY	-	-
ANZ Truckometer Heavy (MoM) (FEB)	07-03-2018	21:00	NZD	-	0.041
Manufacturing Activity (4Q)	07-03-2018	21:45	NZD	-	0.005
Manufacturing Activity Volume (QoQ) (4Q)	07-03-2018	21:45	NZD	-	0.003
ADP Employment Change (FEB)	07-03-2018	13:15	USD	-	-
Consumer Credit (JAN)	07-03-2018	20:00	USD	-	-
DOE Cushing OK Crude Inventory (MAR 2)	07-03-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAR 2)	07-03-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (MAR 2)	07-03-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (MAR 2)	07-03-2018	15:30	USD	-	-
Fed's Bostic Speaks on the Economic Outlook	07-03-2018	13:00	USD	-	-
Fed's Brainard to Speak in New York	07-03-2018	0:00	USD	-	-
Fed's Dudley Speaks in Puerto Rico	07-03-2018	13:00	USD	-	-
Fed's Kaplan Speaks at Energy Conference	07-03-2018	1:30	USD	-	-
MBA Mortgage Applications (MAR 2)	07-03-2018	12:00	USD	-	0.027
Nonfarm Productivity (4Q F)	07-03-2018	13:30	USD	-	(0.001)
Trade Balance (JAN)	07-03-2018	13:30	USD	-	-
U.S. Federal Reserve Releases Beige Book	07-03-2018	19:00	USD	-	-
Unit Labor Costs (4Q F)	07-03-2018	13:30	USD	-	0.02

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