



08 Mar.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,154	0.0 %	9.9 %
BSE SENSEX	33,033	(0.9) %	10.4 %
CNX BANK	24,134	0.0 %	12.0 %
CNX MIDCAP	18,795	0.0 %	8.4 %
CNX SMALLCAP	7,954	0.0 %	12.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,801	(0.3) %	(0.1) %
S&P 500	2,727	(0.1) %	1.1 %
FTSE 100	7,158	0.2 %	(6.4) %
HANG SENG	30,197	(1.0) %	(1.0) %
NIKKEI	21,253	(0.8) %	(9.6) %
SHANGHAI COMPOSITE	3,272	(0.6) %	(2.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.89	(0.4) %	1.9 %
EUR/USD	1.24	1.1 %	3.3 %
GBP/USD	1.39	0.9 %	2.9 %
USD/JPY	106.12	0.1 %	(5.9) %
USD/AUD	1.28	(0.9) %	(0.1) %
USD/SGD	1.31	(0.6) %	(1.5) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	0.0 %	3.7 %
Gold(INR/10g)	30,565	0.4 %	4.1 %
Gold Comex(USD/oz)	1,337	1.0 %	2.1 %
SILVER(INR/1Kg)	38,571	0.2 %	(0.1) %
Aluminium(USD/MT)	2,136	0.0 %	(5.3) %
Copper(USD/MT)	6,969	1.7 %	(3.0) %

**FIXED INCOME**

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

**Global Economy:** The Federal Reserve's Beige Book noted "moderate" inflation and wage hikes across the US, paving the way for an interest rate hike in March. Prices increased in all districts. Most districts saw employers raise wages and expand benefit packages in response to tight labor market conditions. Across the country, contacts observed persistent labor market tightness and brisk demand for qualified workers. Several districts reported continued worker shortages across most sectors, it noted.

**Global Equities:** DOW took a tumble as news of the resignation of White House chief economic advisor Gary Cohn hit the sentiments. European and Asian stocks declined as global trade war concerns intensified in the aftermath of US President Donald Trump's last weekend's announcement of tariffs on steel and aluminium.

**Indian Economy:** The private equity (PE) investments in India witnessed a terrific performance in 2017, clocking a milestone clocking \$21 billion, the highest yearly value, across 735 transactions, a report said. The year recorded a 54% spurt in values at \$21 billion in 2017, despite a 24% decline in volumes. This indicates significant jump in average deal sizes, the sixth edition of Grant Thornton's The Fourth Wheel 2018 report said here.

**Equity Markets:** Selling pressure continued on the domestic bourses on weak global cues coupled with lingering concerns over the health of Indian banking sector, in the aftermath of a massive fraud unearthed at Punjab National Bank's (PNB) branch last month. The Sensex managed to close above 33,000 level on slight recovery in late trade, after falling below that level in the intraday. The market declined for the sixth straight trading session. The Sensex settled at a three-month low. The Nifty settled at its lowest closing level in more than three months.

**Corporate News:** Maruti Suzuki India has achieved production of 162,524 units in February 2018 compared to 137,155 units in February 2017. Ramco Systems has clinched an order from PORR Qatar Construction W.L.L, part of the European construction major, PORR Group, to implement full suite Ramco HCM Solution for PORR's GCC operations. TVS Motor Company rolled out the new generation of the TVS Apache RTR 200 4V. Termed as Race Edition 2.0, the new Apache RTR 200 4V gets the advanced 'Anti-Reverse Torque (A-RT) Slipper Clutch' technology. Tata Motors-owned Jaguar Land Rover (JLR) reported 2.6% decline in global sales at 39,911 units in February.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	115.3	42.4	5.7
MF(INR cr)	0.0	0.0	559.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,358	26,285	33,295
F&O(INR cr)	870,651	845,511	653,290

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.4	18.9	11.9
NSE VIX	15.7	15.4	12.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,134	(1.3) %	12.0 %	Energy	13,358	(1.6) %	13.0 %
IT	12,677	(0.2) %	19.7 %	Pharma	8,615	(1.5) %	(18.0) %
Metals	3,773	(1.2) %	21.5 %	Finance	10,055	(1.4) %	13.9 %
Auto	10,789	(0.3) %	8.7 %	PSU	2,831	(3.6) %	(19.7) %
FMCG	26,061	0.7 %	10.2 %	Real Estate	311	(0.9) %	42.1 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HCL Techno	950	1.8 %	9.6 %	Adani Port	377	(7.0) %	10.2 %
Oracle Fin	3,830	1.8 %	1.2 %	LIC Housin	491	(4.3) %	(21.4) %
Container	1,253	1.4 %	23.9 %	NHPC Ltd	27	(4.0) %	(17.5) %
United Spi	3,070	1.3 %	50.0 %	Sun TV Net	891	(3.9) %	12.0 %
ITC	260	1.3 %	(7.7) %	St Bk of I	247	(3.9) %	(15.9) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Trade Balance (JAN)	08-03-2018	0:30	AUD	-	-
Bank of Canada Deputy Governor Tim Lane Speech	08-03-2018	20:50	CAD	-	-
Building Permits (MoM) (JAN)	08-03-2018	13:30	CAD	-	0.048
Housing Starts (FEB)	08-03-2018	13:15	CAD	-	-
New Housing Price Index (MoM) (JAN)	08-03-2018	13:30	CAD	-	0
New Housing Price Index (YoY) (JAN)	08-03-2018	13:30	CAD	-	0.033
Poloz and Morneau Unveil New Bank Note in Halifax	08-03-2018	16:00	CAD	-	-
Unemployment Rate (FEB)	08-03-2018	6:45	CHF	-	0.033
Unemployment Rate s.a. (FEB)	08-03-2018	6:45	CHF	-	0.03
ECB Deposit Facility Rate (MAR 8)	08-03-2018	12:45	EUR	-	(0.004)
ECB Marginal Lending Facility (MAR 8)	08-03-2018	12:45	EUR	-	0.003
European Central Bank Rate Decision (MAR 8)	08-03-2018	12:45	EUR	-	0
German Factory Orders (MoM) (JAN)	08-03-2018	7:00	EUR	-	0.038
German Factory Orders n.s.a. (YoY) (JAN)	08-03-2018	7:00	EUR	-	0.072
RICS House Price Balance (FEB)	08-03-2018	0:01	GBP	-	0.08
Bankruptcies (YoY) (FEB)	08-03-2018	4:30	JPY	-	0.0495
Japan Money Stock M2+CD (YoY) (FEB)	08-03-2018	23:50	JPY	-	0.034
Japan Money Stock M3 (YoY) (FEB)	08-03-2018	23:50	JPY	-	0.029
Overall Household Spending (YoY) (JAN)	08-03-2018	23:30	JPY	-	(0.001)
Tokyo Avg Office Vacancies (FEB)	08-03-2018	2:00	JPY	-	3.07
Card Spending Retail (MoM) (FEB)	08-03-2018	21:45	NZD	-	0.014
NZ Card Spending (MoM) (FEB)	08-03-2018	21:45	NZD	-	0.006
Challenger Job Cuts (YoY) (FEB)	08-03-2018	12:30	USD	-	(0.028)
Continuing Claims (FEB 24)	08-03-2018	13:30	USD	-	-
EIA Natural Gas Storage Change (MAR 2)	08-03-2018	15:30	USD	-	(78)
EIA Working Natural Gas Implied Flow (MAR 2)	08-03-2018	15:30	USD	-	(78)
Household Change in Net Worth (4Q)	08-03-2018	17:00	USD	-	-
Initial Jobless Claims (MAR 3)	08-03-2018	13:30	USD	-	-



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