



08 Mar.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,022	(0.3) %	7.9 %
BSE SENSEX	36,725	0.2 %	10.2 %
CNX BANK	27,717	(0.2) %	13.9 %
CNX MIDCAP	17,354	(0.3) %	(9.1) %
CNX SMALLCAP	6,360	0.0 %	(19.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,473	(0.8) %	9.2 %
S&P 500	2,749	(0.8) %	9.7 %
FTSE 100	7,158	(0.5) %	6.3 %
HANG SENG	28,779	(0.9) %	14.5 %
NIKKEI	21,456	(0.7) %	9.7 %
SHANGHAI COMPOSITE	3,106	0.1 %	26.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.00	(0.7) %	0.8 %
EUR/USD	1.12	(1.0) %	(2.3) %
GBP/USD	1.31	(0.5) %	2.7 %
USD/JPY	111.51	(0.2) %	1.7 %
USD/AUD	1.42	0.6 %	0.3 %
USD/SGD	1.36	0.3 %	(0.3) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	0.3 %	21.2 %
Gold(INR/10g)	31,982	(0.6) %	1.4 %
Gold Comex(USD/oz)	1,288	(0.0) %	(0.3) %
SILVER(INR/1Kg)	37,779	(0.8) %	(1.3) %
Aluminium(USD/MT)	1,846	(1.2) %	(0.6) %
Copper(USD/MT)	6,505	(0.7) %	11.4 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.7	(0.0) %	0.0 %

**Global Economy:** The European Central Bank announced that it expected rates to remain on hold at least through the end of 2019, and in any case as long as necessary to ensure the continued sustained convergence of inflation toward the ECB's target of near but just below 2% over the medium term. The ECB also said it would launch a new series of quarterly, targeted long-term loans beginning in September and ending in March 2021, each with a maturity of two years. Eurozone's gross domestic product grew 0.2% in fourth quarter from the third quarter, when the economy expanded 0.1%, revised from 0.2 percent reported earlier, latest data from Eurostat showed on Thursday. Compared to the same quarter a year ago, GDP rose 1.1%, revised from 1.2% reported earlier. For the whole year 2018, Eurozone growth was 1.8%, which was slower than the 2.4% expansion in 2017. The FAO Food Price Index (FFPI) averaged 167.5 points in February 2019, up 2.7 points (1.7%) from January. While the February value of the FFPI marked its highest level since August 2018, it remained nearly 4 points (2.3%) below its level in the corresponding month last year. Prices of all commodities represented in the FFPI rose in February, with sharp increases registered for dairy prices. UK house price index rose 2.8% year-on-year in February following a 0.8% increase in January, figures from the Lloyds Bank subsidiary Halifax and IHS Markit showed on Thursday. In the December-February period, house prices climbed 1.8% from the September-November period.

**Global Equities:** Optimism regarding a trade deal between the US and China stayed broadly in place. Traders focused on the latest round of soft global GDP estimates.

**Indian Economy:** The Union Cabinet chaired by Prime Minister Narendra Modi has approved the Scheme to Rebate State and Central Embedded Taxes to Support the Textile Sector. This will enable the Government to take various measures for making exports of apparel and made-ups zero rated. Cabinet committee of on Economic Affairs (CCEA) has taken several key decisions for strengthening of the power sector. Approval was given for four projects worth over Rs. 39,000 crore located at Buxar (Bihar), Khurja (UP), Kishtwar (J&K) and Sirwani (Sikkim).

**Equity Markets:** The BSE Sensex ended with modest gains while the Nifty ended with tiny gains. Gains in Larsen & Toubro, HDFC Bank and ITC boosted indices, while weakness in Infosys and Coal India capped gains.

**Corporate News:** Pharma major Lupin announced that it has received approval for its Atorvastatin Calcium Tablets USP, 10 mg, 20 mg, 40 mg, and 80 mg, from the United States Food and Drug Administration (FDA) to market a generic version of Pfizer Inc's Lipitorfl Tablets, 10 mg, 20 mg, 40 mg and 80 mg. Reliance Industries through a wholly owned subsidiary has entered into an MOU with NMSEZ to sub-lease land of about 4000 acres alongwith the associated development rights by making an initial payment of Rs 2180 crore subject to fulfilment of certain conditions. Jet Airways (India) said that an additional three aircraft have been grounded due to non-payment of amounts outstanding to lessors under their respective lease agreements.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	196.5	173.1	(18.0)
MF(INR cr)	(721.2)	(70.2)	395.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,672	39,480	34,444
F&O(INR cr)	1,703,076	992,736	967,106

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.6	15.1	16.6
NSE VIX	15.3	15.7	15.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,765	0.5 %	14.1 %	Energy	15,348	(0.1) %	15.5 %
IT	15,582	(1.0) %	22.6 %	Pharma	9,046	(1.2) %	4.9 %
Metals	2,993	(0.9) %	(15.4) %	Finance	11,614	0.3 %	13.2 %
Auto	8,636	(0.2) %	(21.9) %	PSU	2,952	1.4 %	3.4 %
FMCG	29,904	0.7 %	12.8 %	Real Estate	236	(0.3) %	(20.4) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
NHPC Ltd	25	3.8 %	(11.3) %	New India	198	(3.5) %	(43.7) %
Bank of Ba	115	2.8 %	(18.8) %	ICICI Pru	330	(3.3) %	(14.2) %
Larsen & T	1,352	2.7 %	1.2 %	Coal India	235	(3.2) %	(15.3) %
Vodafone I	32	2.4 %	(58.9) %	Wipro	269	(3.1) %	23.8 %
A B B	1,271	2.1 %	(1.7) %	Oil India	177	(3.1) %	(22.0) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Housing Starts (FEB)	08-03-2019	13:15	CAD	-	-
Capacity Utilization Rate (4Q)	08-03-2019	13:30	CAD	-	0.826
Full Time Employment Change (FEB)	08-03-2019	13:30	CAD	-	30.9
Hourly Wage Rate Permanent Employees (YoY) (FEB)	08-03-2019	13:30	CAD	-	0.018
Net Change in Employment (FEB)	08-03-2019	13:30	CAD	-	-
Part Time Employment Change (FEB)	08-03-2019	13:30	CAD	-	36
Participation Rate (FEB)	08-03-2019	13:30	CAD	-	65.6
Unemployment Rate (FEB)	08-03-2019	13:30	CAD	-	0.058
Exports (YoY) (FEB)	08-03-2019	00:00	CNY	-	0.091
Exports (YoY) CNY (FEB)	08-03-2019	00:00	CNY	-	0.139
Imports (YoY) (FEB)	08-03-2019	00:00	CNY	-	(0.015)
Imports (YoY) CNY (FEB)	08-03-2019	00:00	CNY	-	0.029
Trade Balance (FEB)	08-03-2019	00:00	CNY	-	-
Trade Balance CNY (FEB)	08-03-2019	00:00	CNY	-	-
German Factory Orders (MoM) (JAN)	08-03-2019	07:00	EUR	-	(0.016)
German Factory Orders n.s.a. (YoY) (JAN)	08-03-2019	07:00	EUR	-	(0.07)
Eco Watchers Survey Current (FEB)	08-03-2019	00:00	JPY	-	45.6
Eco Watchers Survey Outlook SA (FEB)	08-03-2019	00:00	JPY	-	49.4
BOJ Outright Bond Purchase 1~3 Years	08-03-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	08-03-2019	01:10	JPY	-	-
Bankruptcies (YoY) (FEB)	08-03-2019	04:30	JPY	-	0.0488
Average Hourly Earnings (MoM) (FEB)	08-03-2019	13:30	USD	-	0.001
Average Hourly Earnings (YoY) (FEB)	08-03-2019	13:30	USD	-	0.032
Average Weekly Hours All Employees (FEB)	08-03-2019	13:30	USD	-	34.5
Building Permits (JAN)	08-03-2019	13:30	USD	-	-
Building Permits (MoM) (JAN)	08-03-2019	13:30	USD	-	0.003
Change in Manufact. Payrolls (FEB)	08-03-2019	13:30	USD	-	-
Change in Non-farm Payrolls (FEB)	08-03-2019	13:30	USD	-	-
Change in Private Payrolls (FEB)	08-03-2019	13:30	USD	-	-



Housing Starts (JAN)	08-03-2019	13:30	USD	-	-
Housing Starts (MoM) (JAN)	08-03-2019	13:30	USD	-	(0.112)
Labor Force Participation Rate (FEB)	08-03-2019	13:30	USD	-	0.632
Two-Month Payroll Net Revision (FEB)	08-03-2019	13:30	USD	-	-
Underemployment Rate (FEB)	08-03-2019	13:30	USD	-	0.081
Unemployment Rate (FEB)	08-03-2019	13:30	USD	-	0.04
Baker Hughes U.S. Rig Count (MAR 08)	08-03-2019	18:00	USD	-	1038

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