



09 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,255	0.1 %	11.0 %
BSE SENSEX	33,352	1.0 %	11.6 %
CNX BANK	24,395	(0.3) %	13.2 %
CNX MIDCAP	18,886	(0.0) %	9.0 %
CNX SMALLCAP	7,983	(0.0) %	12.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,895	0.4 %	0.3 %
S&P 500	2,739	0.5 %	1.6 %
FTSE 100	7,203	0.6 %	(5.8) %
HANG SENG	30,655	1.5 %	0.5 %
NIKKEI	21,368	0.5 %	(9.1) %
SHANGHAI COMPOSITE	3,288	0.5 %	(1.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.15	0.3 %	2.3 %
EUR/USD	1.23	(0.9) %	2.4 %
GBP/USD	1.38	(0.7) %	2.1 %
USD/JPY	106.89	1.1 %	(5.2) %
USD/AUD	1.28	0.2 %	0.5 %
USD/SGD	1.32	0.2 %	(1.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	(2.3) %	1.3 %
Gold(INR/10g)	30,459	(0.3) %	3.8 %
Gold Comex(USD/oz)	1,328	(0.7) %	1.5 %
SILVER(INR/1Kg)	38,347	(0.6) %	(0.7) %
Aluminium(USD/MT)	2,113	(1.1) %	(6.4) %
Copper(USD/MT)	6,873	(1.4) %	(4.3) %

FIXED INCOME

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

Global Economy: European Central Bank President Mario Draghi said on Thursday that the Governing Council's latest decision to drop the easing bias on asset purchases was taken unanimously. Germany's factory orders dropped on month in January, figures from Destatis revealed Thursday. New orders in manufacturing slipped 3.9% month-on-month in January, reversing a revised 3% rise in December. Excluding major orders, demand in manufacturing declined 2.4%. Domestic orders fell 2.8% while foreign orders tumbled 4.6%. New orders from the euro area were down around 6% and that from other countries dropped 3.8%. On a yearly basis, factory orders advanced notably by 8.2% after rising revised 7.9% in the previous month.

Global Equities: US and European stocks edged up on Thursday as trade tensions showed signs of easing amid expectations that US trade tariffs are likely to be differentiated by country and product.

Indian Economy: The provisional figures of Direct Tax collections up to February, 2018 show that net collections are at Rs.7.44 lakh crore which is 19.5% higher than the net collections for the corresponding period of last year. The net Direct Tax collections represent 74.3% of the Revised Estimates of Direct Taxes for FY 2017-18 (Rs. 10.05 lakh crore). Gross collections (before adjusting for refunds) have increased by 14.5% to Rs.8.83 lakh crore during April 2017 to February 2018. Refunds amounting to Rs.1.39 lakh crore have been issued during April 2017 to February 2018. The growth rate for net collections for Corporate Income Tax (CIT) is 19.7% and for Personal Income Tax (PIT) is 18.6%.

Equity Markets: Key benchmark indices registered modest gains on bargain hunting after a sell-off in the last six sessions. Gains in Asian stocks amid news of potential US tariff exemptions boosted sentiment on the domestic bourses. Key indices started the session on a strong footing on positive Asian stocks as worries surrounding trade war eased on reports US President Donald Trump's import tariff plan may spare select countries from much of the impact.

Corporate News: The Competition Commission of India (CCI) has imposed penalties upon 3 Airlines for concerted action in fixing and revising Fuel Surcharge (FSC) - a component of freight charges. The Final Order was passed by CCI against Jet Airways (India) Ltd., InterGlobe Aviation Limited, Spice Jet Limited, Air India Limited and Go Airlines (India) Limited alleging cartelisation. Ashoka Buildcon announced that the Company's subsidiary viz. Ashoka Concessions (ACL) has received a Letters of Award (LOAs) from NHAI for following three (3) Projects in the State of Karnataka under NHDP Phase-IV on Hybrid Annuity Mode (Projects). Infosys announced that it has been positioned as a Leader in the 2017 NelsonHall NEAT vendor evaluation for Digital Marketing Services. Infosys has been acknowledged for its prowess in delivering immediate client benefits and ability to meet timely client requirements.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(93.1)	8.6	5.3
MF(INR cr)	0.0	0.0	559.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,325	27,893	33,299
F&O(INR cr)	1,678,923	1,012,193	657,711

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.8	18.6	12.0
NSE VIX	14.6	15.2	12.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,478	1.4 %	13.6 %	Energy	13,549	1.4 %	14.6 %
IT	12,682	0.0 %	19.7 %	Pharma	8,586	(0.3) %	(18.3) %
Metals	3,756	(0.4) %	20.9 %	Finance	10,209	1.5 %	15.7 %
Auto	10,895	1.0 %	9.8 %	PSU	2,911	2.8 %	(17.4) %
FMCG	25,953	(0.4) %	9.8 %	Real Estate	316	1.4 %	44.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
St Bk of I	257	4.1 %	(12.4) %	Rural Elec	126	(7.3) %	(30.1) %
ICICI Bank	297	3.6 %	13.9 %	Power Fin.	92	(3.6) %	(37.8) %
Adani Port	388	2.9 %	13.4 %	Oil India	327	(3.0) %	(1.1) %
M & M	727	2.7 %	13.0 %	United Spi	3,002	(2.2) %	46.6 %
Reliance I	911	2.4 %	32.6 %	Godrej Con	1,067	(2.2) %	25.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Capacity Utilization Rate (4Q)	09-03-2018	13:30	CAD	-	0.85
Full Time Employment Change (FEB)	09-03-2018	13:30	CAD	-	49
Net Change in Employment (FEB)	09-03-2018	13:30	CAD	-	-
Part Time Employment Change (FEB)	09-03-2018	13:30	CAD	-	(137)
Participation Rate (FEB)	09-03-2018	13:30	CAD	-	65.5
Unemployment Rate (FEB)	09-03-2018	13:30	CAD	-	0.059
Consumer Price Index (YoY) (FEB)	09-03-2018	1:30	CNY	-	0.015
Producer Price Index (YoY) (FEB)	09-03-2018	1:30	CNY	-	0.043
German Current Account (euros) (JAN)	09-03-2018	7:00	EUR	-	-
German Exports s.a. (MoM) (JAN)	09-03-2018	7:00	EUR	-	0.003
German Imports s.a. (MoM) (JAN)	09-03-2018	7:00	EUR	-	0.014
German Industrial Production n.s.a. and w.d.a. (YoY) (JAN)	09-03-2018	7:00	EUR	-	0.065
German Industrial Production s.a. (MoM) (JAN)	09-03-2018	7:00	EUR	-	(0.006)
German Trade Balance (JAN)	09-03-2018	7:00	EUR	-	-
Labor Costs SA (QoQ) (4Q)	09-03-2018	7:00	EUR	-	0.007
Labor Costs WDA (YoY) (4Q)	09-03-2018	7:00	EUR	-	0.022
Construction Output SA (MoM) (JAN)	09-03-2018	9:30	GBP	-	0.016
Construction Output SA (YoY) (JAN)	09-03-2018	9:30	GBP	-	(0.002)
Industrial Production (MoM) (JAN)	09-03-2018	9:30	GBP	-	(0.013)
Industrial Production (YoY) (JAN)	09-03-2018	9:30	GBP	-	0
Manufacturing Production (MoM) (JAN)	09-03-2018	9:30	GBP	-	0.003
Manufacturing Production (YoY) (JAN)	09-03-2018	9:30	GBP	-	0.014
NIESR Gross Domestic Product Estimate (FEB)	09-03-2018	12:00	GBP	-	0.005
Trade Balance (JAN)	09-03-2018	9:30	GBP	-	-
Trade Balance Non EU GBP/Mn (JAN)	09-03-2018	9:30	GBP	-	-
Visible Trade Balance (Pounds) (JAN)	09-03-2018	9:30	GBP	-	-
Labor Cash Earnings (YoY) (JAN)	09-03-2018	0:00	JPY	-	0.007
Real Cash Earnings (YoY) (JAN)	09-03-2018	0:00	JPY	-	(0.005)
Advanced Monthly Earnings (MoM) (FEB)	09-03-2018	12:00	USD	-	0.002



Average Hourly Earnings (YoY) (FEB)	09-03-2018	13:30	USD	-	0.029
Average Weekly Hours All Employees (FEB)	09-03-2018	13:30	USD	-	34.3
Baker Hughes U.S. Rig Count (MAR 9)	09-03-2018	18:00	USD	-	981
Change in Manufact. Payrolls (FEB)	09-03-2018	13:30	USD	-	-
Change in Non-farm Payrolls (FEB)	09-03-2018	13:30	USD	-	-
Change in Private Payrolls (FEB)	09-03-2018	13:30	USD	-	-
Fed's Evans Speaks on Monetary Policy	09-03-2018	17:45	USD	-	-
Fed's Rosengren Speaks on Outlook	09-03-2018	17:40	USD	-	-
Labor Force Participation Rate (FEB)	09-03-2018	13:30	USD	-	0.627
Two-Month Payroll Net Revision (FEB)	09-03-2018	13:30	USD	-	-
Underemployment Rate (FEB)	09-03-2018	13:30	USD	-	0.082
Unemployment Rate (FEB)	09-03-2018	13:30	USD	-	0.041
Wholesale Inventories (MoM) (JAN F)	09-03-2018	15:00	USD	-	0.007
Wholesale Trade Sales (MoM) (JAN)	09-03-2018	15:00	USD	-	0.012

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