



11 Mar.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|----------|
| CNX NIFTY | 11,035 | (0.2) % | 8.1 % |
| BSE SENSEX | 36,671 | (0.1) % | 10.3 % |
| CNX BANK | 27,762 | (0.0) % | 14.1 % |
| CNX MIDCAP | 17,379 | (0.2) % | (9.0) % |
| CNX SMALLCAP | 6,350 | (0.1) % | (19.9) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 25,450 | (0.1) % | 9.1 % |
| S&P 500 | 2,743 | (0.2) % | 9.4 % |
| FTSE 100 | 7,104 | (0.7) % | 5.5 % |
| HANG SENG | 28,228 | (1.9) % | 12.3 % |
| NIKKEI | 21,026 | (2.0) % | 7.5 % |
| SHANGHAI COMPOSITE | 2,970 | (4.4) % | 20.5 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.15 | 0.2 % | 1.0 % |
| EUR/USD | 1.12 | 0.4 % | (1.9) % |
| GBP/USD | 1.30 | (0.5) % | 2.1 % |
| USD/JPY | 111.17 | (0.3) % | 1.4 % |
| USD/AUD | 1.42 | (0.4) % | (0.1) % |
| USD/SGD | 1.36 | (0.2) % | (0.4) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 56 | (0.3) % | 20.5 % |
| Gold(INR/10g) | 32,123 | 0.4 % | 1.9 % |
| Gold Comex(USD/oz) | 1,299 | 0.9 % | 0.6 % |
| SILVER(INR/1Kg) | 37,826 | 0.1 % | (1.1) % |
| Aluminium(USD/MT) | 1,841 | (0.3) % | (0.9) % |
| Copper(USD/MT) | 6,458 | (0.7) % | 10.6 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec US 10 | 2.6 | (0.0) % | 0.0 % |

Global Economy: The US Labor Department said non-farm payroll employment edged up by 20,000 jobs in February after jumping by an upwardly revised 311,000 jobs in January. The weaker than expected job growth in February represented the worst month since the loss of 18,000 jobs in September of 2017, when employment was impacted by Hurricanes Harvey and Irma. Despite the much weaker than expected job growth, the unemployment rate dropped to 3.8% in February from 4% in January. China's exports dropped the most in three years in February. Exports tumbled 20.7% year-on-year after 9.1% surge in January. Imports also decreased 5.2% year-on-year. The visible trade surplus shrunk to \$4.12 billion from \$39.16 billion in January. German factory orders unexpectedly dropped sharply in January at the fastest pace in seven months. Manufacturing orders decreased a seasonally and calendar adjusted 2.6% month-on-month.

Global Equities: The US equity benchmarks recovered from an intraday tumble on Friday. However, the indices dropped more than 2% for the week.

Indian Economy: The industry produced a total 28,735,269 vehicles including passenger vehicles, commercial vehicles, three wheelers, two wheelers and quadricycle in April-February 2019 as against 26,421,110 in April-February 2018, registering a growth of 8.76% over the same period last year. The sale of Passenger Vehicles grew by 3.27% in April-February 2019 over the same period last year. Within the Passenger Vehicles, the sales of Passenger Cars, Utility Vehicle & Vans grew by 2.91%, 2.09% and 13.05% respectively in April-February 2019 over the same period last year. The overall Commercial Vehicles segment registered a growth of 19.71% in April- February 2019 as compared to the same period last year.

Equity Markets: Key equity benchmarks snapped gains after rising in past four consecutive sessions. Weakness in IT and metal shares put pressure on bourses. The Nifty managed to settle above the psychological 11,000 mark. Weak global cues amid concern over sluggish global growth spoiled investors sentiment.

Corporate News: The Tata Motors Group global wholesales in February 2019, including Jaguar Land Rover, were at 110,262 nos., lower by 9%, as compared to February 2018. GMR Infrastructure Subsidiary GMR Airports received the formal Letter of Award from MIHAN India Limited, the concessioning authority for the Nagpur Airport, towards the development, operations and management of Dr Babasaheb Ambedkar International Airport, Nagpur, at a revenue share of 14.49% of gross revenues. Suven Life Sciences board approved the creation of wholly owned subsidiary (WOS) Suven Pharma, Inc a Delaware Company in USA under CRAMS division, and investment of \$75 million in the said WOS for new business opportunities and acquisitions, etc. HG Infra Engineering has received a letter from NHAI with respect to nullifying of bidding process and to re-invite the bids for new EPC project under NHAI for construction of 6-lane access controlled Green field highway in Rajasthan.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 153.4 | 168.1 | (17.3) |
| MF(INR cr) | (482.7) | (210.5) | 391.5 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 33,227 | 38,230 | 34,439 |
| F&O(INR cr) | 539,931 | 902,175 | 965,272 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 16.1 | 15.2 | 16.6 |
| NSE VIX | 14.9 | 15.6 | 15.3 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 27,762 | (0.0) % | 14.1 % | Energy | 15,353 | 0.0 % | 15.5 % |
| IT | 15,409 | (1.1) % | 21.3 % | Pharma | 9,022 | (0.3) % | 4.7 % |
| Metals | 2,948 | (1.5) % | (16.7) % | Finance | 11,620 | 0.0 % | 13.2 % |
| Auto | 8,583 | (0.6) % | (22.4) % | PSU | 2,937 | (0.5) % | 2.9 % |
| FMCG | 29,946 | 0.1 % | 13.0 % | Real Estate | 237 | 0.2 % | (20.2) % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| NTPC | 152 | 4.1 % | (10.7) % | Tata Motor | 181 | (4.3) % | (46.6) % |
| ICICI Pru | 342 | 3.6 % | (11.0) % | Wipro | 258 | (4.1) % | 18.6 % |
| ICICI Lomb | 978 | 2.8 % | 24.7 % | Tata Motor | 92 | (3.5) % | (51.6) % |
| Ambuja Cem | 226 | 2.2 % | (5.8) % | Sun TV Net | 596 | (2.9) % | (30.7) % |
| Petronet L | 234 | 2.1 % | 1.3 % | Tata Steel | 508 | (2.6) % | (12.3) % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

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