



12 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,257	0.8 %	10.2 %
BSE SENSEX	37,054	1.0 %	12.4 %
CNX BANK	28,184	0.8 %	15.8 %
CNX MIDCAP	17,895	0.8 %	(6.3) %
CNX SMALLCAP	6,572	1.1 %	(17.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,651	0.8 %	10.0 %
S&P 500	2,783	1.5 %	11.0 %
FTSE 100	7,131	0.4 %	5.9 %
HANG SENG	28,503	1.0 %	13.4 %
NIKKEI	21,125	0.5 %	8.0 %
SHANGHAI COMPOSITE	3,027	1.9 %	22.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.89	(0.2) %	0.7 %
EUR/USD	1.13	0.6 %	(1.7) %
GBP/USD	1.32	1.0 %	3.7 %
USD/JPY	111.41	(0.1) %	1.6 %
USD/AUD	1.41	(0.7) %	(0.5) %
USD/SGD	1.36	(0.3) %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.3 %	22.0 %
Gold(INR/10g)	32,110	(0.0) %	1.8 %
Gold Comex(USD/oz)	1,296	(0.2) %	0.4 %
SILVER(INR/1Kg)	38,225	1.1 %	(0.1) %
Aluminium(USD/MT)	1,848	0.4 %	(0.5) %
Copper(USD/MT)	6,399	(0.9) %	9.6 %

FIXED INCOME

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

Global Economy: The US Commerce Department said retail sales rose by 0.2% in January after tumbling by a revised 1.6% in December. Business inventories in the US increased in line with economist estimates in the month of December, according to a report released by the Commerce Department on Monday. The report said business inventories climbed by 0.6% in December. Composite leading indicators (CLIs), designed to anticipate turning points in economic activity relative to trend six to nine months ahead, continue to anticipate easing growth momentum in most major economies. Easing growth momentum remains the assessment for the United States, Canada, the United Kingdom and the euro area as a whole, including Germany and Italy and is now also anticipated in Japan, reflecting declines in the expected sales of small businesses, the stock market and hours worked in manufacturing. Germany's industrial production unexpectedly decreased in January. Industrial production decreased 0.8% month-on-month in January, preliminary data from the Federal Statistical Office showed on Monday. German exports were unchanged from the previous month in January after a 1.5% increase in December while the imports grew 1.5% monthly after a 0.7% gain in December.

Global Equities: Markets digested latest US nonfarm jobs reading. Chinese stocks rebounded after heavy losses on Friday.

Indian Economy: Confederation Of Indian Industry (CII) targets an average growth rate of 8% per annum for the next five years for the Indian economy. The CII called for compressing GST rate slabs to 2 or 3 and lowering corporate income tax to 18% with no exemptions to make Indian tax rates globally competitive. On electoral reforms, CII suggests devising a model for simultaneous elections of Parliament and state legislatures from 2024. According to EY's Private Equity Monthly Deal Tracker - February 2019, investments worth US\$2.6 billion across 61 deals and exits worth US\$472 million across 10 deals were recorded in India. Both investments and exits were supported by improvement in deal activity in listed securities as stability emerged in the financial markets after witnessing significant volatility in the previous few months.

Equity Markets: The market clocked steep gains on Monday, following the announcement of general election 2019 dates on Sunday by the Election Commission of India (EC). The Sensex settled above the psychological 37,000 mark after moving above and below that level in intraday trade. The Sensex rose 382.67 points or 1.04% to settle at 37,054.10, its highest closing level since 19 September 2018. The Nifty 50 index rose 140.90 points or 1.28% to settle at 11,176.30, its highest closing level since 19 September 2018. Sentiments look supported as OECD sees stable growth momentum for India.

Corporate News: State-owned NBCC said it has secured orders worth Rs 700 crore from Raipur SMART City Ltd. Jet Airways (India) announced that the part repayment of the external commercial borrowing availed by the company, for working capital purposes, falling due on 11 March 2019, has been delayed owing to temporary liquidity constraints. Piramal Enterprises announced the launch of Mitigo (morphine sulfate injection, USP - preservative-free) in 10 mg/mL and 25 mg/mL concentrations in the US market. Mitigo is used for patients with intractable chronic pain.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	160.7	166.7	(16.5)
MF(INR cr)	(482.7)	(210.5)	391.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,430	38,096	34,452
F&O(INR cr)	679,946	865,137	964,053

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.3	15.1	16.6
NSE VIX	14.9	15.4	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,967	0.7 %	15.0 %	Energy	15,771	2.7 %	18.7 %
IT	15,389	(0.1) %	21.1 %	Pharma	9,155	1.5 %	6.2 %
Metals	3,029	2.7 %	(14.4) %	Finance	11,721	0.9 %	14.2 %
Auto	8,783	2.3 %	(20.6) %	PSU	3,007	2.4 %	5.3 %
FMCG	30,256	1.0 %	14.2 %	Real Estate	239	0.9 %	(19.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharti Air	334	8.1 %	(15.5) %	P & G Hygi	10,188	(1.3) %	8.5 %
SBI Life I	622	6.0 %	(9.0) %	NTPC	151	(0.5) %	(11.2) %
H P C L	263	5.4 %	(23.5) %	Tech Mahin	807	(0.5) %	26.1 %
B P C L	387	5.4 %	(8.6) %	Zee Entert	453	(0.5) %	(21.8) %
Motherson	172	5.4 %	(20.2) %	HCL Techno	1,004	(0.5) %	2.5 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (MoM) (JAN)	12-03-2019	00:30	AUD	-	(0.082)
Investment Lending (JAN)	12-03-2019	00:30	AUD	-	(0.046)
NAB Business Conditions (FEB)	12-03-2019	00:30	AUD	-	7
NAB Business Confidence (FEB)	12-03-2019	00:30	AUD	-	4
Owner-Occupier Loan Value (MoM) (JAN)	12-03-2019	00:30	AUD	-	(0.064)
RBA's Debelle Gives Speech in Sydney	12-03-2019	06:30	AUD	-	-
Westpac Consumer Conf Index (MAR)	12-03-2019	23:30	AUD	-	103.8
Westpac Consumer Confidence (MAR)	12-03-2019	23:30	AUD	-	0.043
SSM's Enria Speaks in Basel	12-03-2019	08:45	EUR	-	-
ECB's Lautenschlaeger Speaks in Basel	12-03-2019	10:45	EUR	-	-
Construction Output SA (MoM) (JAN)	12-03-2019	09:30	GBP	-	(0.028)
Construction Output SA (YoY) (JAN)	12-03-2019	09:30	GBP	-	(0.024)
Gross Domestic Product (MoM) (JAN)	12-03-2019	09:30	GBP	-	(0.004)
Index of Services (3Mo3M) (JAN)	12-03-2019	09:30	GBP	-	0.004
Index of Services (MoM) (JAN)	12-03-2019	09:30	GBP	-	(0.002)
Industrial Production (MoM) (JAN)	12-03-2019	09:30	GBP	-	(0.005)
Industrial Production (YoY) (JAN)	12-03-2019	09:30	GBP	-	(0.009)
Manufacturing Production (MoM) (JAN)	12-03-2019	09:30	GBP	-	(0.007)
Manufacturing Production (YoY) (JAN)	12-03-2019	09:30	GBP	-	(0.021)
Monthly GDP 3M/3M Change (JAN)	12-03-2019	09:30	GBP	-	-
Trade Balance (JAN)	12-03-2019	09:30	GBP	-	-
Trade Balance Non EU GBP/Mn (JAN)	12-03-2019	09:30	GBP	-	-
Visible Trade Balance (Pounds) (JAN)	12-03-2019	09:30	GBP	-	-
Japan Manpower Survey (2Q)	12-03-2019	00:01	JPY	-	27
Domestic Corporate Goods Price Index (MoM) (FEB)	12-03-2019	23:50	JPY	-	(0.006)
Domestic Corporate Goods Price Index (YoY) (FEB)	12-03-2019	23:50	JPY	-	0.006
Machine Orders (MoM) (JAN)	12-03-2019	23:50	JPY	-	(0.001)
Machine Orders (YoY) (JAN)	12-03-2019	23:50	JPY	-	0.009
Real Business (MoM) (FEB)	12-03-2019	23:45	NZD	-	0.01



NFIB Small Business Optimism (FEB)	12-03-2019	10:00	USD	-	101.2
Consumer Price Index (MoM) (FEB)	12-03-2019	12:30	USD	-	0
Consumer Price Index (YoY) (FEB)	12-03-2019	12:30	USD	-	0.016
Consumer Price Index Core Index s.a. (FEB)	12-03-2019	12:30	USD	-	260.701
Consumer Price Index Ex Food and Energy (MoM) (FEB)	12-03-2019	12:30	USD	-	0.002
Consumer Price Index Ex Food and Energy (YoY) (FEB)	12-03-2019	12:30	USD	-	0.022
Consumer Price Index n.s.a. (FEB)	12-03-2019	12:30	USD	-	251.712
Real Avg Hourly Earning (YoY) (FEB)	12-03-2019	12:30	USD	-	0.017
Real Avg Weekly Earnings (YoY) (FEB)	12-03-2019	12:30	USD	-	0.019
Brainard Speaks at Community Reinvestment Conference in DC	12-03-2019	12:45	USD	-	-
U.S. to Sell USD24 Bln 10-Year Notes Reopening	12-03-2019	17:00	USD	-	-

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