



13 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,390	(0.3) %	12.5 %
BSE SENSEX	33,918	1.8 %	13.1 %
CNX BANK	24,625	(0.2) %	14.3 %
CNX MIDCAP	18,938	(0.1) %	9.3 %
CNX SMALLCAP	8,025	(0.0) %	13.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,179	(0.6) %	1.4 %
S&P 500	2,783	(0.1) %	3.2 %
FTSE 100	7,215	(0.1) %	(5.7) %
HANG SENG	31,594	1.9 %	3.5 %
NIKKEI	21,824	1.7 %	(7.2) %
SHANGHAI COMPOSITE	3,327	0.6 %	(0.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.04	(0.2) %	2.2 %
EUR/USD	1.23	0.3 %	2.7 %
GBP/USD	1.39	0.8 %	2.9 %
USD/JPY	106.37	(0.5) %	(5.6) %
USD/AUD	1.27	(1.2) %	(0.8) %
USD/SGD	1.31	(0.5) %	(1.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	3.2 %	2.8 %
Gold(INR/10g)	30,271	(0.3) %	3.1 %
Gold Comex(USD/oz)	1,324	0.4 %	1.2 %
SILVER(INR/1Kg)	38,164	(0.4) %	(1.1) %
Aluminium(USD/MT)	2,079	(0.2) %	(7.9) %
Copper(USD/MT)	6,808	(0.3) %	(5.2) %

FIXED INCOME

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

Global Economy: UK consumers reduced their spending in February as the high street remained a key source of weakness, a survey compiled by IHS Markit on behalf of Visa, showed on Monday. According to the Visa consumer spending index, expenditure dropped 1.1% from a year ago in February. The Bank for International Settlements warned that weakened fundamentals make Asian developers more vulnerable to shocks. The agency cited that higher interest rates or lower property prices can make situation vulnerable. As most of the developers' debt is in the form of bank loans, higher market rates could quickly push up debt costs. Japan's business survey index of large manufacturers weakened notably in the three months ended March. The Business Survey Index, or BSI, dropped 2.9 in the three-month period to March from 9.7 in the previous three months.

Global Equities: US markets turned in a mixed outing amid lack of economic data. Stocks had soared on Friday following a stronger US jobs report and continued bargain buying.

Indian Economy: India's retail inflation eased at 4.4% in February. The rate of increase in price rise slowed for the second consecutive month from 5.2% in December and 5.07% in January. Consumer food price inflation, a metric to gauge changes in monthly kitchen costs, slipped to 3.38% in February as compared with a 4.58% growth in January.

Equity Markets: Local stocks recorded sharp gains on the first trading day of the week with the barometer index, the S&P BSE Sensex, and the Nifty 50 index, hitting their highest closing levels in 1-1/2 weeks, on upbeat global stocks. Gains were led by strong buying demand in index heavyweights ITC, HDFC and Reliance Industries. Stocks of public sector banks declined. Stocks of private sector banks advanced. Cigarette major ITC jumped after the cess on cigarettes was kept unchanged in GST Council meeting last weekend.

Corporate News: India's industrial production rose 7.5% in January. Cumulative IIP growth for the period of April-January over the corresponding period of the previous year stands at 4.1%. The latest surge was led by a robust growth in the manufacturing sector which showed a growth of 8.7%, data released by the Central Statistics Office showed. The index had recorded 7.1% growth in December and 8.8% in November. L&T Special Steels and Heavy Forgings Private, a joint venture of Larsen & Toubro and the state-run Nuclear Power Corporation of India, has received an order worth Rs 442 crore from NPCIL to supply forgings for steam generators, the engineering major said in a statement Monday.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	93.4	51.1	6.4
MF(INR cr)	94.2	(172.5)	549.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,189	28,549	33,273
F&O(INR cr)	550,661	870,446	656,501

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.6	17.6	12.0
NSE VIX	14.5	15.0	12.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,664	1.5 %	14.5 %	Energy	13,835	2.2 %	17.1 %
IT	12,923	1.4 %	22.0 %	Pharma	8,601	1.0 %	(18.1) %
Metals	3,767	2.1 %	21.3 %	Finance	10,347	1.5 %	17.2 %
Auto	11,046	1.4 %	11.3 %	PSU	2,845	(0.5) %	(19.3) %
FMCG	26,703	2.6 %	13.0 %	Real Estate	317	0.5 %	44.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
United Spi	3,134	5.2 %	53.1 %	Power Fin.	88	(5.2) %	(40.3) %
Bharti Air	422	4.8 %	23.3 %	Emami	1,062	(2.1) %	1.2 %
Vedanta	317	4.4 %	16.4 %	Coal India	298	(2.1) %	0.9 %
ITC	270	4.2 %	(4.1) %	Aurobindo	583	(1.6) %	(14.7) %
NTPC	171	4.1 %	3.9 %	Torrent Ph	1,312	(1.3) %	(12.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Australia Manpower Survey (2Q)	13-03-2018	0:01	AUD	-	0.13
Home Loans (MoM) (Jan)	13-03-2018	0:30	AUD	-	(0.023)
Investment Lending (Jan)	13-03-2018	0:30	AUD	-	(0.026)
NAB Business Conditions (Feb)	13-03-2018	0:30	AUD	-	19
NAB Business Confidence (Feb)	13-03-2018	0:30	AUD	-	12
RBA's Bullock Gives Speech in Sydney	13-03-2018	0:10	AUD	-	-
RBA's Kent Gives Speech in Sydney	13-03-2018	22:10	AUD	-	-
Value of Loans (MoM) (Jan)	13-03-2018	0:30	AUD	-	(0.01)
Westpac Consumer Conf Index (Mar)	13-03-2018	23:30	AUD	-	102.7
Westpac Consumer Confidence (Mar)	13-03-2018	23:30	AUD	-	(0.023)
Bank of Canada Governor Stephen Poloz Speech in Kingston	13-03-2018	14:30	CAD	-	-
Manpower Survey (2Q)	13-03-2018	0:01	CNY	-	0.08
Germany Second Quarter Manpower Employment Outlook	13-03-2018	0:01	EUR	-	-
BOJ Minutes of Policy Meeting	13-03-2018	23:50	JPY	-	-
Japan Manpower Survey (2Q)	13-03-2018	0:01	JPY	-	24
Machine Orders (MoM) (Jan)	13-03-2018	23:50	JPY	-	(0.119)
Machine Orders (YoY) (Jan)	13-03-2018	23:50	JPY	-	(0.05)
Tertiary Industry Index (MoM) (Jan)	13-03-2018	4:30	JPY	-	(0.002)
BoP Current Account Balance (4Q)	13-03-2018	21:45	NZD	-	-
Current Account Gross Domestic Product Ratio YTD (4Q)	13-03-2018	21:45	NZD	-	(0.026)
New Zealand Manpower Survey (2Q)	13-03-2018	0:01	NZD	-	0.16
REINZ House Sales (YoY) (Feb)	13-03-2018	20:00	NZD	-	0.027
Consumer Price Index (MoM) (Feb)	13-03-2018	12:30	USD	-	0.005
Consumer Price Index (YoY) (Feb)	13-03-2018	12:30	USD	-	0.021
Consumer Price Index Core Index s.a. (Feb)	13-03-2018	12:30	USD	-	255.287
Consumer Price Index Ex Food and Energy (MoM) (Feb)	13-03-2018	12:30	USD	-	0.003
Consumer Price Index Ex Food and Energy (YoY) (Feb)	13-03-2018	12:30	USD	-	0.018
Consumer Price Index n.s.a. (Feb)	13-03-2018	12:30	USD	-	247.867
NZFP Small Business Optimism (Feb)	13-03-2018	10:00	USD	-	106.0



Real Avg Hourly Earning (YoY) (Feb)	13-03-2018	12:30	USD	-	0.008
Real Avg Weekly Earnings (YoY) (Feb)	13-03-2018	12:30	USD	-	0.004
U.S. to Sell 4-Week Bills	13-03-2018	15:30	USD	-	-
U.S. to Sell USD13 Bln 30-Year Bonds Reopening	13-03-2018	17:00	USD	-	-

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