



13 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,287	(0.1) %	10.5 %
BSE SENSEX	37,536	1.3 %	12.8 %
CNX BANK	28,399	(0.2) %	16.7 %
CNX MIDCAP	17,774	(0.3) %	(6.9) %
CNX SMALLCAP	6,580	(0.1) %	(17.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,555	(0.4) %	9.5 %
S&P 500	2,792	0.3 %	11.4 %
FTSE 100	7,151	0.3 %	6.2 %
HANG SENG	28,921	1.5 %	15.1 %
NIKKEI	21,504	1.8 %	9.9 %
SHANGHAI COMPOSITE	3,060	1.1 %	24.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.71	(0.6) %	0.4 %
EUR/USD	1.13	0.5 %	(1.4) %
GBP/USD	1.31	0.6 %	2.7 %
USD/JPY	111.20	0.0 %	1.4 %
USD/AUD	1.42	(0.1) %	(0.2) %
USD/SGD	1.36	(0.2) %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	0.1 %	22.2 %
Gold(INR/10g)	32,033	(0.2) %	1.6 %
Gold Comex(USD/oz)	1,305	0.7 %	1.1 %
SILVER(INR/1Kg)	38,362	0.4 %	0.3 %
Aluminium(USD/MT)	1,851	1.1 %	(0.4) %
Copper(USD/MT)	6,510	1.2 %	11.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	(0.1) %	(0.0) %

Global Economy: US consumer price index rose by 0.2% in February after coming in unchanged for three straight months. Excluding food and energy prices, core consumer prices inched up by 0.1% in February after rising by 0.2% in January. The UK economy was supported by growth in all main sectors such as manufacturing, services and constructions, preliminary figures from the Office for National Statistics showed on Tuesday. Gross domestic product grew 0.5% month-on-month in January after a 0.40% drop in December. On a 3-month-on-3-month basis, GDP rose 0.20% in January. Manufacturing output grew 0.8% after a 0.7% drop in December. The latest rise was the first since June 2018.

Global Equities: Sentiments turned positive for global stocks after European Commission agreed to changes in a Brexit deal ahead of a vote in the British parliament. However, DOW slipped on profit selling.

Indian Economy: The consumer price inflation grew by a three month high of 2.57% in February, marginally higher than the previous month's 2.05%, and sharply lower than 5.07% in the same month last year. Consumer food price inflation fell 0.66% during the month though. Industrial production slipped to 1.7% in January 2019 from 2.4% in December 2018. Eleven out of the twenty three industry groups in the manufacturing sector have shown positive growth during the month of January 2019.

Equity Markets: Key equity indices reported sharp gains on strong buying demand in index pivots. Overall risk appetite improved after foreign investors ramped up buying in domestic equity market. The sentiment also got a boost by a strong rupee and positive global stocks after the European Commission agreed to changes in a Brexit deal ahead of a vote in the British parliament. The Sensex rose 481.56 points or 1.30% to settle at 37,535.66, its highest closing level since 17 September 2018. The Nifty 50 index rose 133.15 points or 1.19% to settle at 11,301.20, its highest closing level since 17 September 2018.

Corporate News: HCL Technologies has been categorized as a Leader in Everest Group's recently released report, Life & Pensions (L&P) Insurance Digital Services PEAK Matrix 2019 – Leapfrogging the Digital Transformation Stage. This report analyzes the changing dynamics of the L&P Digital services landscape and assesses service providers across several key dimensions. Keerthi Industries has been successfully awarded the onshore contract area of KG/ONDSF/Gokarnapuram/2018 in KG basin under the Discovered Small Field Bid Round – II of offer Contract Areas. The Board of Housing & Urban Development Corporation has approved the raising of funds through issue of bonds/ debentures during the financial year 2019-20 upto a maximum of Rs. 30,000 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	493.8	221.2	(14.3)
MF(INR cr)	(482.7)	(210.5)	391.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	45,088	39,095	34,497
F&O(INR cr)	1,017,693	886,930	964,281

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.8	14.9	16.6
NSE VIX	15.1	15.4	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,444	1.7 %	16.9 %	Energy	15,991	1.4 %	20.3 %
IT	15,385	(0.0) %	21.1 %	Pharma	9,275	1.3 %	7.6 %
Metals	3,043	0.5 %	(14.0) %	Finance	11,895	1.5 %	15.9 %
Auto	8,803	0.2 %	(20.4) %	PSU	3,001	(0.2) %	5.1 %
FMCG	30,481	0.7 %	15.0 %	Real Estate	245	2.6 %	(17.4) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
DLF	188	6.2 %	(6.6) %	HDFC Life	372	(4.9) %	(23.0) %
Bharti Air	352	5.4 %	(11.0) %	Interglobe	1,270	(2.5) %	(4.4) %
General In	260	3.7 %	(29.6) %	Motherson	168	(2.3) %	(22.1) %
IndusInd B	1,569	3.6 %	(13.1) %	Eicher Mot	22,462	(2.2) %	(20.6) %
ICICI Bank	388	3.3 %	48.3 %	NHPC Ltd	25	(1.6) %	(10.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Teranet/National Bank HP Index (FEB)	13-03-2019	12:30	CAD	-	223.96
Teranet/National Bank HPI (MoM) (FEB)	13-03-2019	12:30	CAD	-	(0.001)
Teranet/National Bank HPI (YoY) (FEB)	13-03-2019	12:30	CAD	-	0.022
Euro-Zone Industrial Production s.a. (MoM) (JAN)	13-03-2019	10:00	EUR	-	(0.009)
Euro-Zone Industrial Production w.d.a. (YoY) (JAN)	13-03-2019	10:00	EUR	-	(0.042)
ECB's Coeure Speaks in Milan	13-03-2019	17:00	EUR	-	-
BOJ Outright Bond Purchase 10~25 Years	13-03-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	13-03-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	13-03-2019	01:10	JPY	-	-
Tertiary Industry Index (MoM) (JAN)	13-03-2019	04:30	JPY	-	(0.003)
Foreign Buying Japan Bonds (MAR 08)	13-03-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAR 08)	13-03-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAR 08)	13-03-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAR 08)	13-03-2019	23:50	JPY	-	-
Industrial Production NSA (YoY) (JAN)	13-03-2019	14:00	MXN	-	(0.025)
MBA Mortgage Applications (MAR 08)	13-03-2019	11:00	USD	-	(0.025)
Cap Goods Orders Nondef Ex Air (JAN P)	13-03-2019	12:30	USD	-	-
Cap Goods Ship Nondef Ex Air (JAN P)	13-03-2019	12:30	USD	-	-
Durable Goods Orders (JAN P)	13-03-2019	12:30	USD	-	-
Durables Ex Transportation (JAN P)	13-03-2019	12:30	USD	-	-
PPI Ex Food, Energy, Trade (MoM) (FEB)	13-03-2019	12:30	USD	-	0.002
PPI Ex Food, Energy, Trade (YoY) (FEB)	13-03-2019	12:30	USD	-	0.025
PPI Final Demand (YoY) (FEB)	13-03-2019	12:30	USD	-	0.02
Producer Price Index Ex Food and Energy (MoM) (FEB)	13-03-2019	12:30	USD	-	0.003
Producer Price Index Ex Food and Energy (YoY) (FEB)	13-03-2019	12:30	USD	-	0.026
Producer Price Index Final Demand (MoM) (FEB)	13-03-2019	12:30	USD	-	(0.001)
Construction Spending (MoM) (JAN)	13-03-2019	14:00	USD	-	(0.006)
DOE Cushing OK Crude Inventory (MAR 08)	13-03-2019	14:30	USD	-	-
DOE US Crude Oil Inventories (MAR 08)	13-03-2019	14:30	USD	-	-



DOE U.S. Distillate Inventory (MAR 08)	13-03-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (MAR 08)	13-03-2019	14:30	USD	-	-
U.S. to Sell USD16 Bln 30-Year Bonds Reopening	13-03-2019	17:00	USD	-	-

..... **End of Report**

