



14 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,427	0.1 %	12.9 %
BSE SENSEX	33,857	(0.2) %	13.2 %
CNX BANK	24,739	0.3 %	14.8 %
CNX MIDCAP	19,108	0.8 %	10.2 %
CNX SMALLCAP	8,158	1.6 %	15.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,007	(0.7) %	0.7 %
S&P 500	2,765	(0.6) %	2.6 %
FTSE 100	7,139	(1.1) %	(6.7) %
HANG SENG	31,601	0.0 %	3.6 %
NIKKEI	21,968	0.7 %	(6.5) %
SHANGHAI COMPOSITE	3,310	(0.5) %	(1.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.89	(0.4) %	1.9 %
EUR/USD	1.24	0.8 %	3.3 %
GBP/USD	1.40	1.0 %	3.6 %
USD/JPY	106.47	(0.3) %	(5.5) %
USD/AUD	1.27	(0.4) %	(0.7) %
USD/SGD	1.31	(0.5) %	(1.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	(1.1) %	1.6 %
Gold(INR/10g)	30,238	(0.1) %	3.0 %
Gold Comex(USD/oz)	1,323	(0.1) %	1.1 %
SILVER(INR/1Kg)	38,260	0.3 %	(0.9) %
Aluminium(USD/MT)	2,097	0.9 %	(7.0) %
Copper(USD/MT)	6,857	0.7 %	(4.5) %

FIXED INCOME

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

Global Economy: The Organisation for Economic Co-operation and Development, in its latest Interim Economic Outlook, released Tuesday said that the global economy is set to expand at a robust pace this year and next, but trade tensions could threaten sustainable growth. The Paris-based think tank said the global economy will grow 3.9% in both 2018 and 2019. The projection for this year was revised up from 3.7% and that for 2019 from 3.6%. Stronger investment, the rebound in global trade and higher employment are helping to make the recovery increasingly broad-based, the OECD noted. The US Labor Department said its consumer price index increased 0.2% last month. In the 12 months through February, the CPI rose 2.2%. The so-called core CPI increased by 0.2% from a month earlier and rose 1.8% in the 12 months through February.

Global Equities: US markets slipped as tech shares fell after recent surge. Investors remained worried after US President Donald Trump fired Secretary of State Rex Tillerson.

Indian Economy: The hike in import duty on steel (25%) and aluminium (10%) by the US is unlikely to immediately impact Indian producers, as exports to the US are low at 2% and 6%, respectively, stated India Ratings and Research, noted media reports. However, the impact could percolate through lower international prices due to excess supply from exporting countries while also leading to lower exports. Global price corrections could further delay the deleveraging plans of Indian steel players. India's export of aluminium to the US increased by around 2x between 2015-2017 during January-October, while steel exports to US remained flat despite 40% growth in the overall exports by India.

Equity Markets: Local stocks slipped in late trade. A divergent trend was witnessed as the barometer index, the S&P BSE Sensex, settled with small losses while the Nifty 50 index registered minor gains. The Sensex settled below the 34,000 level after gyrating above and below that level in intraday trade. Stocks of public sector banks surged on optimism triggered by media report that Bank of India recovered nearly Rs 7000 crore bad loans in the last two months. IT stocks declined as the rupee firmed against the dollar.

Corporate News: Bajaj Corp announced that the company's flagship brand ' Bajaj Almond Drops Hair Oil' has been recognised as one of Asia's most valuable brands at the 6th Asia Brand and Leadership Summit held in Singapore. Hero MotoCorp has commenced retail sales of the new ePassion PRO and Passion XPROf across markets in the country. The Reserve Bank of India has scrapped quasi bank guarantee instruments such as the Letter of Undertaking and Letter of Comfort that were involved in nearly Rs 14,000 crore Punjab National Bank scam. The Delhi bench of NCLT on Tuesday has said that lenders cannot hold any meeting to decide on the resolution plan for Bhushan Power and Steel till the court delivers a final verdict in a matter where UK's Liberty House has requested for its late bid for the company to be considered.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	217.4	74.8	7.3
MF(INR cr)	574.4	(23.1)	549.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	49,160	31,125	33,340
F&O(INR cr)	895,731	873,606	657,519

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.8	17.3	12.0
NSE VIX	14.5	14.9	12.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,739	0.3 %	14.8 %	Energy	13,934	0.7 %	17.9 %
IT	12,734	(1.5) %	20.2 %	Pharma	8,712	1.3 %	(17.1) %
Metals	3,787	0.5 %	21.9 %	Finance	10,385	0.4 %	17.7 %
Auto	11,064	0.2 %	11.5 %	PSU	2,911	2.3 %	(17.4) %
FMCG	26,645	(0.2) %	12.7 %	Real Estate	322	1.4 %	46.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bank of Ba	142	7.2 %	(17.9) %	TCS	2,887	(5.4) %	19.7 %
B P C L	467	4.5 %	9.6 %	GlaxoSmith	6,625	(3.1) %	27.8 %
H P C L	383	4.4 %	10.8 %	United Spi	3,081	(1.7) %	50.5 %
LIC Housin	513	4.2 %	(17.9) %	A B B	1,411	(1.6) %	6.8 %
Shree Ceme	16,796	4.0 %	(2.2) %	Kotak Mah.	1,084	(1.5) %	23.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Teranet/National Bank HP Index (Feb)	14-03-2018	12:30	CAD	-	219.19
Teranet/National Bank HPI (MoM) (Feb)	14-03-2018	12:30	CAD	-	0.003
Teranet/National Bank HPI (YoY) (Feb)	14-03-2018	12:30	CAD	-	0.087
Fixed Assets Ex Rural YTD (YoY) (Feb)	14-03-2018	2:00	CNY	-	0.072
Industrial Production YTD (YoY) (Feb)	14-03-2018	2:00	CNY	-	0.066
Retail Sales YTD (YoY) (Feb)	14-03-2018	2:00	CNY	-	0.102
ECB President Draghi speaks in Frankfurt	14-03-2018	8:00	EUR	-	-
ECB Vice President Constancio speaks in Frankfurt	14-03-2018	10:45	EUR	-	-
ECB's Coeure meets fintech companies in Berlin	14-03-2018	7:30	EUR	-	-
ECB's Coeure speaks in Berlin	14-03-2018	16:15	EUR	-	-
ECB's Peter Praet to speak in Frankfurt	14-03-2018	8:45	EUR	-	-
Euro-Zone Employment (QoQ) (4Q)	14-03-2018	10:00	EUR	-	0.004
Euro-Zone Employment (YoY) (4Q)	14-03-2018	10:00	EUR	-	0.017
Euro-Zone Industrial Production s.a. (MoM) (Jan)	14-03-2018	10:00	EUR	-	0.004
Euro-Zone Industrial Production w.d.a. (YoY) (Jan)	14-03-2018	10:00	EUR	-	0.052
German Consumer Price Index (MoM) (Feb F)	14-03-2018	7:00	EUR	-	0.005
German Consumer Price Index (YoY) (Feb F)	14-03-2018	7:00	EUR	-	0.014
BOJ Outright Bond Purchase 1~3 Years	14-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	14-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	14-03-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (Mar 9)	14-03-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (Mar 9)	14-03-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (Mar 9)	14-03-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (Mar 9)	14-03-2018	23:50	JPY	-	-
Gross Domestic Product (YoY) (4Q)	14-03-2018	21:45	NZD	-	0.027
Gross Domestic Product s.a. (QoQ) (4Q)	14-03-2018	21:45	NZD	-	0.006
Business Inventories (Jan)	14-03-2018	14:00	USD	-	0.004
DOE Cushing OK Crude Inventory (Mar 9)	14-03-2018	14:30	USD	-	-
DOE US Crude Oil Inventories (Mar 9)	14-03-2018	14:30	USD	-	-



DOE U.S. Distillate Inventory (Mar 9)	14-03-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (Mar 9)	14-03-2018	14:30	USD	-	-
MBA Mortgage Applications (Mar 9)	14-03-2018	11:00	USD	-	0.003
Producer Price Index Ex Food and Energy (MoM) (Feb)	14-03-2018	12:30	USD	-	0.004
Producer Price Index Ex Food and Energy (YoY) (Feb)	14-03-2018	12:30	USD	-	0.022
Producer Price Index Ex Food, Energy, Trade (MoM) (Feb)	14-03-2018	12:30	USD	-	0.004
Producer Price Index Ex Food, Energy, Trade (YoY) (Feb)	14-03-2018	12:30	USD	-	0.025
Producer Price Index Final Demand (MoM) (Feb)	14-03-2018	12:30	USD	-	0.004
Producer Price Index Final Demand (YoY) (Feb)	14-03-2018	12:30	USD	-	0.027
Retail Sales Advance (MoM) (Feb)	14-03-2018	12:30	USD	-	(0.003)
Retail Sales Control Group (Feb)	14-03-2018	12:30	USD	-	0
Retail Sales Ex Auto (MoM) (Feb)	14-03-2018	12:30	USD	-	0
Retail Sales Ex Auto and Gas (Feb)	14-03-2018	12:30	USD	-	(0.002)

..... End of Report

