



14 Mar.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,341	(0.0) %	11.1 %
BSE SENSEX	37,752	0.6 %	13.8 %
CNX BANK	28,884	0.0 %	18.7 %
CNX MIDCAP	17,733	0.0 %	(7.1) %
CNX SMALLCAP	6,571	0.0 %	(17.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,703	0.6 %	10.2 %
S&P 500	2,811	0.7 %	12.1 %
FTSE 100	7,159	0.1 %	6.3 %
HANG SENG	28,807	(0.4) %	14.6 %
NIKKEI	21,290	(1.0) %	8.8 %
SHANGHAI COMPOSITE	3,027	(1.1) %	22.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.54	(0.5) %	0.2 %
EUR/USD	1.13	0.6 %	(1.1) %
GBP/USD	1.33	0.4 %	4.1 %
USD/JPY	111.46	0.1 %	1.7 %
USD/AUD	1.41	(0.1) %	(0.5) %
USD/SGD	1.35	(0.2) %	(0.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	2.4 %	25.2 %
Gold(INR/10g)	32,225	0.6 %	2.2 %
Gold Comex(USD/oz)	1,305	0.0 %	1.1 %
SILVER(INR/1Kg)	38,491	0.3 %	0.6 %
Aluminium(USD/MT)	1,873	1.2 %	0.8 %
Copper(USD/MT)	6,529	0.3 %	11.8 %

**FIXED INCOME**

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

**Global Economy:** The US durable goods orders rose by 0.4% in January after spiking by an upwardly revised 1.3% in December. The US construction spending surged by 1.3% to an annual rate of \$1.280 trillion in January after falling by 0.8% to a revised rate of \$1.263 billion in December. Eurozone's industrial production rose in January after falling in the previous two months, figures from the statistical office showed on Wednesday. Industrial production rose 1.4% from December. Growth was driven by a 2.4% rise in energy production. Capital goods output also rose 0.9%, durable goods production grew 1.1% and intermediate goods production edged up 0.2%. However, on a year-on-year basis, industrial production dropped 1.1% after a 4.2% slump in December. Japan core machine orders dropped a seasonally adjusted 5.4% in January, the Cabinet Office - coming in at 822.3 billion yen, following the downwardly revised 0.3% fall in December (originally -0.1%). On a yearly basis, core machine orders sank 2.9%, following the 0.9% gain in the previous month.

**Global Equities:** Supportive US economic data pushed up the Nasdaq and the S&P 500 to around five-month highs.

**Indian Economy:** The Reserve Bank released data on performance of the private corporate sector during the third quarter of 2018-19 drawn from abridged financial results of 2,703 listed non-government non-financial (NGNF) companies. Demand conditions in the manufacturing sector weakened as reflected in moderation of sales growth (y-o-y). This moderation was observed mainly in Textiles, Iron and Steel, Motor Vehicles and other Transport equipments industries whereas sales growth improved for consumer-driven sectors such as Food Product and Beverages, and Pharmaceuticals.

**Equity Markets:** Key equity indices ended with modest rise after a volatile trading session. Gains were capped as broader market witnessed profit selling after a recent rally. Negative global cues also dampened investors' risk appetite. Local stocks have surged near six month high following the recent bout of strength.

**Corporate News:** Unichem Laboratories has received ANDA approval for its Allopurinol Tablets, USP 100 mg and 300 mg from the United States Food and Drug Administration (USFDA) to market a generic version of ZYLOPRIM® (allopurinol) Tablets. Housing & Urban Development Corporation announced that Fitch Ratings has assigned HUDCO Long Term Foreign Currency and Local Currency Issuer Default ratings of "BBB-". The Outlook is Stable. Reliance Industries could extend upmove after rising by more than 1% to a lifetime high of 1347 yesterday. The top corporate is in the process of demerging fibre assets into a separate company, which could then be monetised via a sale and leaseback or infrastructure investment trust (InvIT) structure.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	511.1	262.6	(12.0)
MF(INR cr)	(482.7)	(210.5)	391.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	42,807	39,559	34,532
F&O(INR cr)	1,314,638	940,394	965,766

## MARKET VOLATILITY

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

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,884	1.5 %	18.7 %	Energy	16,042	0.3 %	20.7 %
IT	15,343	(0.3) %	20.7 %	Pharma	9,100	(1.9) %	5.6 %
Metals	2,986	(1.9) %	(15.6) %	Finance	12,034	1.2 %	17.3 %
Auto	8,768	(0.4) %	(20.7) %	PSU	3,051	1.6 %	6.9 %
FMCG	30,452	(0.1) %	14.9 %	Real Estate	246	0.6 %	(16.9) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
IndusInd B	1,636	4.3 %	(9.3) %	Lupin	763	(4.7) %	(1.8) %
Pidilite I	1,176	3.9 %	25.0 %	S A I L	53	(4.3) %	(27.9) %
Container	523	3.9 %	5.3 %	Bharti Air	338	(4.0) %	(14.5) %
Yes Bank	244	3.6 %	(20.2) %	Vedanta	172	(3.8) %	(39.2) %
A B B	1,297	3.4 %	0.3 %	I O C L	149	(3.5) %	(12.7) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (MAR)	14-03-2019	00:00	AUD	-	0.037
New Housing Price Index (MoM) (JAN)	14-03-2019	12:30	CAD	-	0
New Housing Price Index (YoY) (JAN)	14-03-2019	12:30	CAD	-	0
Bank of Canada Wilkins Speech	14-03-2019	22:50	CAD	-	-
SECO March 2019 Economic Forecasts	14-03-2019	06:45	CHF	-	-
Producer & Import Prices (MoM) (FEB)	14-03-2019	07:30	CHF	-	(0.007)
Producer & Import Prices (YoY) (FEB)	14-03-2019	07:30	CHF	-	(0.005)
Fixed Assets Ex Rural YTD (YoY) (FEB)	14-03-2019	02:00	CNY	-	0.059
Industrial Production YTD (YoY) (FEB)	14-03-2019	02:00	CNY	-	0.062
Property Investment (YoY) (FEB)	14-03-2019	02:00	CNY	-	0.095
Retail Sales YTD (YoY) (FEB)	14-03-2019	02:00	CNY	-	0.09
Surveyed Jobless Rate (FEB)	14-03-2019	02:00	CNY	-	0.049
German Consumer Price Index (MoM) (FEB F)	14-03-2019	07:00	EUR	-	0.005
German Consumer Price Index (YoY) (FEB F)	14-03-2019	07:00	EUR	-	0.016
RICS House Price Balance (FEB)	14-03-2019	00:01	GBP	-	(0.22)
BusinessNZ Manufacturing PMI (FEB)	14-03-2019	21:30	NZD	-	53.1
Net Migration s.a. (JAN)	14-03-2019	21:45	NZD	-	5080
Continuing Claims (MAR 02)	14-03-2019	12:30	USD	-	-
Export Price Index (MoM) (FEB)	14-03-2019	12:30	USD	-	(0.006)
Export Price Index (YoY) (FEB)	14-03-2019	12:30	USD	-	(0.002)
Import Price Index (MoM) (FEB)	14-03-2019	12:30	USD	-	(0.005)
Import Price Index (YoY) (FEB)	14-03-2019	12:30	USD	-	(0.017)
Import Price Index ex Petroleum (MoM) (FEB)	14-03-2019	12:30	USD	-	(0.007)
Initial Jobless Claims (MAR 09)	14-03-2019	12:30	USD	-	-
New Home Sales (JAN)	14-03-2019	14:00	USD	-	-
New Home Sales (MoM) (JAN)	14-03-2019	14:00	USD	-	0.037
EIA Working Natural Gas Implied Flow (MAR 08)	14-03-2019	14:30	USD	-	(149)
U.S. to Sell 4-Week Bills	14-03-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	14-03-2019	15:30	USD	-	-



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