



15 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,411	0.0 %	12.7 %
BSE SENSEX	33,836	(0.1) %	13.2 %
CNX BANK	24,852	0.0 %	15.3 %
CNX MIDCAP	19,184	0.0 %	10.7 %
CNX SMALLCAP	8,154	0.0 %	15.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,758	(1.0) %	(0.3) %
S&P 500	2,749	(0.6) %	2.0 %
FTSE 100	7,133	(0.1) %	(6.7) %
HANG SENG	31,435	(0.5) %	3.0 %
NIKKEI	21,777	(0.9) %	(7.4) %
SHANGHAI COMPOSITE	3,291	(0.6) %	(1.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.83	(0.3) %	1.8 %
EUR/USD	1.24	0.4 %	3.1 %
GBP/USD	1.40	0.5 %	3.4 %
USD/JPY	105.97	(0.4) %	(6.0) %
USD/AUD	1.27	(0.0) %	(0.8) %
USD/SGD	1.31	(0.2) %	(1.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	(0.7) %	0.9 %
Gold(INR/10g)	30,375	0.5 %	3.5 %
Gold Comex(USD/oz)	1,328	0.4 %	1.5 %
SILVER(INR/1Kg)	38,355	0.2 %	(0.6) %
Aluminium(USD/MT)	2,080	(0.8) %	(7.8) %
Copper(USD/MT)	6,883	0.4 %	(4.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.4 %

Global Economy: US retail sales dropped for a third month in a row in February, according to figures from the Commerce Department. Retail sales dropped 0.1%. Data from the National Bureau of Statistics showed that China's industrial output jumped 7.2% year-on-year in January to February period, while growth was seen at 6.2%, the same as in December. This was the biggest expansion since last June, suggesting that the economy sustained robust growth at the start of the year. Eurozone industrial production decreased 1% month-on-month in January, in contrast to December's 0.4% rise, Eurostat reported. This was the first fall since last September. All components except capital and non-durable consumer goods declined in January. On a yearly basis, industrial production growth slowed to 2.7% in January from 5.3% a month ago. Minutes from the Bank of Japan's January meeting showed that some board members warned the central bank should keep a close eye on unexpected side effects from the current monetary policy.

Global Equities: US markets fell on retail sales figures. European stocks were somewhat supported on European Central Bank President Mario Draghi's statement that its bond-buying program will likely continue if underlying inflation in the region remains subdued.

Indian Economy: India's wholesale inflation slipped to a seven month low of 2.48% in February, according to latest official data. Wholesale price inflation (WPI) was 2.84% in January 2018 and 5.51% in February 2017. The rate of inflation based on WPI Food Index consisting of 'Food Articles' from Primary Articles group and 'Food Product' from Manufactured Products group decreased from 1.65% in January, 2018 to 0.07% in February, 2018, commerce and industry ministry said in a press release.

Equity Markets: Local indices logged small losses in volatile session of trade amid divergent trend in index pivots. Weakness in Asian stocks weighed on sentiment on the domestic bourses. The stocks of PSU banks saw a relief rally for the second consecutive day. Stocks of public sector oil marketing companies (PSU OMCs) tumbled. Domestic stocks began trading on a subdued note on negative Asian stocks. The market sentiment also took a hit after the Reserve Bank of India (RBI) banned letters of undertaking (LoUs) for seeking overseas loans.

Corporate News: The World Bank projected India's GDP growth at 7.3% for the next financial year and accelerate further to 7.5% in 2019-20. The World Bank's biannual publication, India Development Update: India's Growth Story expects the economy to clock a growth rate of 6.7% in the current fiscal year. Bharti Airtel informed that the committee of directors of the company has approved the allotment of 30,000 listed, unsecured, rated, redeemable, non-convertible debentures (Series I and II) aggregating to Rs 3000 crore on private placement basis. Online recruitment activities in the month of January 2018 registered 16% year-on-year growth, according to the Monster Employment Index, up from 12% in January 2018. India's real estate sector is estimated to reach \$180 billion by 2020 from \$126 billion in 2015, according to a joint report by CREDAI and JLL.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	759.7	160.4	10.6
MF(INR cr)	(273.0)	(75.8)	543.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,018	31,113	33,331
F&O(INR cr)	800,356	865,467	658,124

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.4	17.2	12.0
NSE VIX	14.4	14.9	12.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,852	0.5 %	15.3 %	Energy	13,843	(0.7) %	17.1 %
IT	12,787	0.4 %	20.7 %	Pharma	8,702	(0.1) %	(17.2) %
Metals	3,765	(0.6) %	21.2 %	Finance	10,388	0.0 %	17.7 %
Auto	11,061	(0.0) %	11.5 %	PSU	2,962	1.7 %	(16.0) %
FMCG	26,532	(0.4) %	12.2 %	Real Estate	320	(0.5) %	46.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oil India	341	4.2 %	3.2 %	Power Fin.	87	(3.5) %	(41.3) %
Sun TV Net	932	3.5 %	17.1 %	I O C L	395	(3.1) %	3.6 %
Tech Mahin	639	3.2 %	41.1 %	Bharti Inf	339	(2.8) %	2.9 %
Bank of Ba	146	3.0 %	(15.5) %	Interglobe	1,269	(2.5) %	21.7 %
Glenmark P	552	2.6 %	(35.6) %	H P C L	375	(2.0) %	8.6 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (Mar)	15-03-2018	0:00	AUD	-	0.036
RBA Foreign Exchange Transaction (Australian dollar) (Feb)	15-03-2018	0:30	AUD	-	-
RBA FX Transactions Government (Feb)	15-03-2018	0:30	AUD	-	-
RBA FX Transactions Other (Feb)	15-03-2018	0:30	AUD	-	-
RBA's Debelle Gives Speech in Sydney	15-03-2018	22:45	AUD	-	-
ADP Publishes February Payrolls Report	15-03-2018	12:30	CAD	-	-
Existing Home Sales (MoM) (Feb)	15-03-2018	13:00	CAD	-	(0.145)
Producer & Import Prices (MoM) (Feb)	15-03-2018	8:15	CHF	-	0.003
Producer & Import Prices (YoY) (Feb)	15-03-2018	8:15	CHF	-	0.018
SNB 3-Month Libor Lower Target Range (Mar 15)	15-03-2018	8:30	CHF	-	(0.0125)
SNB 3-Month Libor Upper Target Range (Mar 15)	15-03-2018	8:30	CHF	-	(0.0025)
SNB Sight Deposit Interest Rate (Mar 15)	15-03-2018	8:30	CHF	-	(0.0075)
ECB's Lautenschlaeger speaks in Florence	15-03-2018	15:45	EUR	-	-
EU 25 New Car Registrations (Feb)	15-03-2018	7:00	EUR	-	0.071
Tokyo Condominium Sales (YoY) (Feb)	15-03-2018	4:00	JPY	-	0.397
BusinessNZ Manufacturing PMI (Feb)	15-03-2018	21:30	NZD	-	55.6
Continuing Claims (Mar 3)	15-03-2018	12:30	USD	-	-
EIA Natural Gas Storage Change (Mar 9)	15-03-2018	14:30	USD	-	(57)
EIA Working Natural Gas Implied Flow (Mar 9)	15-03-2018	14:30	USD	-	(57)
Empire Manufacturing (Mar)	15-03-2018	12:30	USD	-	13.1
Export Price Index (MoM) (Feb)	15-03-2018	12:30	USD	-	0.008
Export Price Index (YoY) (Feb)	15-03-2018	12:30	USD	-	0.034
Import Price Index (MoM) (Feb)	15-03-2018	12:30	USD	-	0.01
Import Price Index (YoY) (Feb)	15-03-2018	12:30	USD	-	0.036
Import Price Index ex Petroleum (MoM) (Feb)	15-03-2018	12:30	USD	-	0.005
Initial Jobless Claims (Mar 10)	15-03-2018	12:30	USD	-	-
NAHB Housing Market Index (Mar)	15-03-2018	14:00	USD	-	72
Net Long-term TIC Flows (Jan)	15-03-2018	20:00	USD	-	-
Philadelphi Fed Business Outlook (Mar)	15-03-2018	13:30	USD	-	25.8



Total Net TIC Flows (Jan)

15-03-2018 20:00

USD

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