



15 Mar.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,422	0.7 %	11.9 %
BSE SENSEX	37,755	0.0 %	14.2 %
CNX BANK	29,330	1.4 %	20.6 %
CNX MIDCAP	17,904	0.9 %	(6.2) %
CNX SMALLCAP	6,604	0.5 %	(16.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,710	0.0 %	10.2 %
S&P 500	2,808	(0.1) %	12.0 %
FTSE 100	7,185	0.4 %	6.7 %
HANG SENG	28,851	0.2 %	14.8 %
NIKKEI	21,287	(0.0) %	8.8 %
SHANGHAI COMPOSITE	2,991	(1.2) %	21.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.35	(0.5) %	(0.1) %
EUR/USD	1.13	0.2 %	(1.2) %
GBP/USD	1.32	1.2 %	3.9 %
USD/JPY	111.84	0.6 %	2.0 %
USD/AUD	1.41	(0.4) %	(0.6) %
USD/SGD	1.36	(0.1) %	(0.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	0.6 %	25.9 %
Gold(INR/10g)	31,960	(0.8) %	1.4 %
Gold Comex(USD/oz)	1,296	(0.7) %	0.4 %
SILVER(INR/1Kg)	37,804	(1.8) %	(1.2) %
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 Commerce Department released a report on Thursday showing a substantial pullback in US new home sales in the month of January. The Commerce Department said new home sales plunged by 6.9% to an annual rate of 607,000 in January from a revised rate of 652,000 in December. The US initial jobless claims rose to 229,000, an increase of 6,000 from the previous week's unrevised level of 223,000. China's industrial output rose by 5.3% year on year in the first two months, narrowing from 5.7% growth in December 2018, the National Bureau of Statistics said Thursday. This data marked 17-year low for the measure. However, deducting the Spring Festival factor, China's industrial output expanded 6.1% year on year in the first two months. In other data releases today, growth in fixed-asset investment, recorded a rise of 6.1% in the first two months of this year. Retail sales also rose at a decent clip of 8.2% in January-February from a year earlier.

**Global Equities:** Sentiments stayed cautious as weak Chinese economic cues and a selloff in metals weighed on sentiments.

**Indian Economy:** The annual rate of wholesale price inflation, based on monthly Wholesale Price Index WPI, stood at 2.93% for the month of February, 2019 (over February, 2018) as compared to 2.76% for the previous month and 2.74% during the corresponding month of the previous year. Build up inflation rate in the financial year so far was 2.75% compared to a build up rate of 2.56% in the corresponding period of the previous year. Domestic coal production during April-February 2018-19 was 638.46 million tonnes (mt) as compared to 591.42 mt during corresponding period of previous year with a growth rate of 8.0% on y-o-y basis.

**Equity Markets:** Local stocks saw a volatile session on weak global cues and profit selling after recent surge in benchmark indices. Key equity indices ended almost flat. Selling in index heavyweights like ICICI Bank and Reliance Industries restricted gains in key benchmarks.

**Corporate News:** SBI, ICICI Bank, and HDFC Bank continue to be identified as Domestic Systemically Important Banks (D-SIBs), under the same bucketing structure as last year, noted the RBI. The Indian Media and Entertainment (M&E) sector reached INR1.67 trillion (US\$23.9 billion) in 2018, a growth of 13.4% over 2017, states the FICCI-EY report, 'A billion screens of opportunity,' launched at the FICCI FRAMES 2019. With its current trajectory, the M&E sector in India is expected to cross INR2.35 trillion (US\$33.6 billion) by 2021, at a CAGR of 11.6%. Indian Rupee hit a multi month high of 69.30 per US dollar. RBI is set to inject Rupee liquidity for longer duration through long-term foreign exchange Buy/Sell swap in terms of its extant Liquidity Management Framework.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	317.9	269.5	(10.6)
MF(INR cr)	(482.7)	(210.5)	391.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,802	39,253	34,542
F&O(INR cr)	1,997,209	1,057,818	970,118

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	14.8	16.6
NSE VIX	15.2	15.4	15.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,923	0.1 %	18.9 %	Energy	16,025	(0.1) %	20.6 %
IT	15,260	(0.5) %	20.1 %	Pharma	9,185	0.9 %	6.5 %
Metals	3,002	0.5 %	(15.2) %	Finance	12,027	(0.1) %	17.2 %
Auto	8,726	(0.5) %	(21.1) %	PSU	3,042	(0.3) %	6.6 %
FMCG	30,467	0.1 %	15.0 %	Real Estate	252	2.2 %	(15.0) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
DLF	202	5.0 %	0.4 %	Power Grid	188	(3.7) %	(3.7) %
NTPC	154	3.7 %	(9.8) %	Container	509	(2.6) %	2.5 %
IndusInd B	1,683	2.8 %	(6.8) %	Shriram Tr	1,247	(2.6) %	(15.1) %
Yes Bank	250	2.3 %	(18.4) %	Havells In	747	(2.5) %	47.2 %
Sun Pharma	466	2.1 %	(8.2) %	Ambuja Cem	224	(2.5) %	(6.7) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Manufacturing Sales (MoM) (JAN)	15-03-2019	12:30	CAD	-	(0.013)
Existing Home Sales (MoM) (FEB)	15-03-2019	13:00	CAD	-	0.036
New Home Prices (MoM) (FEB)	15-03-2019	01:30	CNY	-	0.0061
EU 25 New Car Registrations (FEB)	15-03-2019	07:00	EUR	-	(0.046)
German Wholesale Price Index (MoM) (FEB)	15-03-2019	07:00	EUR	-	(0.007)
German Wholesale Price Index (YoY) (FEB)	15-03-2019	07:00	EUR	-	0.011
Euro-Zone Consumer Price Index (MoM) (FEB)	15-03-2019	10:00	EUR	-	(0.01)
Euro-Zone Consumer Price Index (YoY) (FEB F)	15-03-2019	10:00	EUR	-	0.014
Euro-Zone Consumer Price Index Core (YoY) (FEB F)	15-03-2019	10:00	EUR	-	0.01
Empire Manufacturing (MAR)	15-03-2019	12:30	USD	-	8.8
Capacity Utilization (FEB)	15-03-2019	13:15	USD	-	0.782
Industrial Production (MoM) (FEB)	15-03-2019	13:15	USD	-	(0.006)
Manufacturing (SIC) Production (FEB)	15-03-2019	13:15	USD	-	(0.009)
JOLTS Job Openings (JAN)	15-03-2019	14:00	USD	-	7335
U. of Mich. 1 Yr Inflation (MAR P)	15-03-2019	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (MAR P)	15-03-2019	14:00	USD	-	0.023
U. of Mich. Current Conditions (MAR P)	15-03-2019	14:00	USD	-	108.5
U. of Mich. Expectations (MAR P)	15-03-2019	14:00	USD	-	84.4
U. of Mich. Sentiment (MAR P)	15-03-2019	14:00	USD	-	93.8
Baker Hughes U.S. Rig Count (MAR 15)	15-03-2019	17:00	USD	-	1027
Net Long-term TIC Flows (JAN)	15-03-2019	20:00	USD	-	-
Total Net TIC Flows (JAN)	15-03-2019	20:00	USD	-	-

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