



16 Mar.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,313	(0.5) %	11.6 %
BSE SENSEX	33,686	(0.4) %	12.1 %
CNX BANK	24,679	(0.5) %	14.5 %
CNX MIDCAP	19,318	0.3 %	11.4 %
CNX SMALLCAP	8,262	0.5 %	16.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,874	0.5 %	0.2 %
S&P 500	2,747	(0.1) %	1.9 %
FTSE 100	7,140	0.1 %	(6.6) %
HANG SENG	31,541	0.3 %	3.4 %
NIKKEI	21,804	0.1 %	(7.2) %
SHANGHAI COMPOSITE	3,291	(0.0) %	(1.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.93	0.1 %	2.0 %
EUR/USD	1.23	(0.8) %	2.5 %
GBP/USD	1.39	(0.5) %	3.1 %
USD/JPY	105.99	(0.5) %	(6.0) %
USD/AUD	1.28	1.1 %	0.4 %
USD/SGD	1.32	0.4 %	(1.5) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	0.1 %	1.0 %
Gold(INR/10g)	30,320	(0.2) %	3.3 %
Gold Comex(USD/oz)	1,327	(0.1) %	1.4 %
SILVER(INR/1Kg)	38,212	(0.4) %	(1.0) %
Aluminium(USD/MT)	2,096	0.8 %	(7.1) %
Copper(USD/MT)	7,015	1.9 %	(2.3) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.3 %

**Global Economy:** Homebuilder confidence in the US saw a modest decrease in the month of March, according to a report released by the National Association of Home Builders on Thursday. The report said the NAHB/Wells Fargo Housing Market Index edged down to 70 in March from a revised 71 in February. US initial jobless claims dipped to 226,000, a decrease of 4,000 from the previous week's revised level of 230,000. Europe's new car registrations rose at a slower pace in February, the European Automobile Manufacturers' Association reported Thursday. Passenger car market grew 4.3 percent year-on-year in February, slower than the 7.1 percent increase registered in January. All major EU markets posted growth except the United Kingdom and Italy. Car sales in Spain posted a double-digit growth of 13 percent, followed by Germany with 7.4 percent increase and France's growth at 4.3 percent. In the UK, car sales dropped for the 11th consecutive month in February. Registrations were down 2.8 percent.

**Global Equities:** European stocks edged up as investors tried to gauge the implications of the latest personnel changes in the Trump administration. Asian markets saw mixed trend.

**Indian Economy:** Trade deficit in February stood at \$12 billion led by increase in imports due to higher oil prices, the Commerce Ministry said. Exports grew 4.5% YoY to \$25.8 billion while imports rose 10.4% YoY to \$37.8 billion.

**Equity Markets:** Local stocks extended losses for a third day on selling pressure in banking, FMCG and IT shares fell amid fresh Letter of Undertaking fraud scare at PNB. After trading with weakness in mid-afternoon trade, fresh selling pushed the key benchmark indices to intraday lows in late trade.

**Corporate News:** IT major Wipro said it invested \$2.02 million in Avaamo Inc, an artificial intelligence-based conversational computing platform. The company said the investment would give Wipro a minority stake of less than 20% on a fully diluted basis. Corporate India announced merger and acquisition (M&A) deals worth \$1,893 million in February this year, registering a 40% increase in value terms over the year ago period driven by big ticket transactions, says a report by assurance, tax and advisory firm Grant Thornton. There were 40 M&A transactions in February, while in the corresponding period a year ago there were 32 such deals worth \$1,354 million. This increase in M&A deal value in February was driven by big-ticket consolidation that saw four deals valued over \$100 million contributing to 79% of the total M&A values. During the current year 2017-18, the growth in supply of coal to power sector is 7.2%, based on the rising demand of coal based generating stations. As estimated by the Ministry of Power, the Pan India growth of coal based generation would be 5.4% to 5.7% in the current year & next four years. Future Consumer announced that CARE Ratings has reaffirmed its ratings assigned to the company in respect of commercial paper (Rs 100 crore) at CARE A1.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(7.6)	141.8	10.5
MF(INR cr)	(273.0)	(75.8)	543.0

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,609	31,363	33,332
F&O(INR cr)	1,335,192	912,440	660,981

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.2	17.2	12.1
NSE VIX	14.3	14.8	12.9

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,792	(0.2) %	15.1 %	Energy	13,667	(1.3) %	15.6 %
IT	12,762	(0.2) %	20.5 %	Pharma	8,671	(0.4) %	(17.5) %
Metals	3,754	(0.3) %	20.9 %	Finance	10,373	(0.1) %	17.5 %
Auto	11,052	(0.1) %	11.4 %	PSU	2,940	(0.7) %	(16.6) %
FMCG	26,381	(0.6) %	11.6 %	Real Estate	320	(0.1) %	46.0 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Shriram Tr	1,461	6.1 %	32.3 %	I O C L	192	(2.8) %	0.8 %
S A I L	75	3.6 %	19.3 %	Yes Bank	312	(2.2) %	1.3 %
United Spi	3,189	2.4 %	55.8 %	Motherson	314	(1.9) %	25.5 %
Asian Pain	1,161	2.1 %	6.5 %	Reliance I	912	(1.9) %	32.7 %
DLF	225	2.0 %	53.5 %	JSW Steel	295	(1.8) %	56.2 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
International Securities Transactions (Canadian dollar) (Jan)	16-03-2018	12:30	CAD	-	-
Manufacturing Sales (MoM) (Jan)	16-03-2018	12:30	CAD	-	(0.003)
Euro-Zone Consumer Price Index (MoM) (Feb)	16-03-2018	10:00	EUR	-	(0.009)
Euro-Zone Consumer Price Index (YoY) (Feb F)	16-03-2018	10:00	EUR	-	0.013
Euro-Zone Consumer Price Index Core (YoY) (Feb F)	16-03-2018	10:00	EUR	-	0.01
Euro-Zone Labour Costs (YoY) (4Q)	16-03-2018	10:00	EUR	-	0.016
German Wholesale Price Index (MoM) (Feb)	16-03-2018	7:00	EUR	-	0.009
German Wholesale Price Index (YoY) (Feb)	16-03-2018	7:00	EUR	-	0.02
BOJ Outright Bond Purchase 10~25 Years	16-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	16-03-2018	1:10	JPY	-	-
Capacity Utilization (MoM) (Jan)	16-03-2018	4:30	JPY	-	0.028
Industrial Production (MoM) (Jan F)	16-03-2018	4:30	JPY	-	(0.066)
Industrial Production (YoY) (Jan F)	16-03-2018	4:30	JPY	-	0.027
Non Resident Bond Holdings (Feb)	16-03-2018	2:00	NZD	-	0.6
Baker Hughes U.S. Rig Count (Mar 16)	16-03-2018	17:00	USD	-	984
Building Permits (Feb)	16-03-2018	12:30	USD	-	-
Building Permits (MoM) (Feb)	16-03-2018	12:30	USD	-	0.074
Capacity Utilization (Feb)	16-03-2018	13:15	USD	-	0.775
Housing Starts (Feb)	16-03-2018	12:30	USD	-	-
Housing Starts (MoM) (Feb)	16-03-2018	12:30	USD	-	0.097
Industrial Production (MoM) (Feb)	16-03-2018	13:15	USD	-	(0.001)
JOLTS Job Openings (Jan)	16-03-2018	14:00	USD	-	5811
Manufacturing (SIC) Production (Feb)	16-03-2018	13:15	USD	-	0
Revisions: JOLTS	16-03-2018	14:00	USD	-	-
U. of Mich. 1 Yr Inflation (Mar P)	16-03-2018	14:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (Mar P)	16-03-2018	14:00	USD	-	0.025
U. of Mich. Current Conditions (Mar P)	16-03-2018	14:00	USD	-	114.9
U. of Mich. Expectations (Mar P)	16-03-2018	14:00	USD	-	90
U. of Mich. Sentiment (Mar P)	16-03-2018	14:00	USD	-	99.7



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