



18 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,427	0.7 %	11.9 %
BSE SENSEX	38,024	0.7 %	14.3 %
CNX BANK	29,381	1.6 %	20.8 %
CNX MIDCAP	17,863	0.6 %	(6.5) %
CNX SMALLCAP	6,536	(0.5) %	(17.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,849	0.5 %	10.8 %
S&P 500	2,822	0.5 %	12.6 %
FTSE 100	7,228	0.6 %	7.3 %
HANG SENG	29,012	0.6 %	15.4 %
NIKKEI	21,451	0.8 %	9.7 %
SHANGHAI COMPOSITE	3,022	1.0 %	22.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.10	(0.4) %	(0.5) %
EUR/USD	1.13	0.1 %	(1.1) %
GBP/USD	1.33	0.4 %	4.3 %
USD/JPY	111.48	(0.3) %	1.7 %
USD/AUD	1.41	(0.1) %	(0.7) %
USD/SGD	1.35	(0.2) %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	0.2 %	26.2 %
Gold(INR/10g)	31,966	0.0 %	1.4 %
Gold Comex(USD/oz)	1,302	0.5 %	0.9 %
SILVER(INR/1Kg)	37,993	0.5 %	(0.7) %
Aluminium(USD/MT)	1,868	(0.3) %	0.5 %
Copper(USD/MT)	6,410	0.0 %	9.8 %

FIXED INCOME

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

Global Economy: Preliminary data released by the University of Michigan on Friday showed a significant improvement in US consumer sentiment in the month of March. The consumer sentiment index surged to 97.8 in March from the final February reading of 93.8. The US Fed said industrial production inched up by 0.1% in February after falling by a revised 0.4% in January. Growth in New York manufacturing activity unexpectedly slowed in the month of March, according to the Federal Reserve Bank of New York. The New York Fed said its headline general business conditions index fell to 3.7 in March. Eurozone inflation rose in February, while the core price growth eased, latest figures from Eurostat confirmed on Friday. The harmonized inflation rose to 1.5% from January's 1.4%. However, the core inflation rate that excludes energy, food, alcohol and tobacco, eased to 1% in February from 1.1% in January. The Bank of Japan (BOJ) kept its monetary policy steady on Friday. The policy board of the BoJ voted 7-2 to purchase government bonds so that the yield of 10-year JGBs will remain at around zero percent. The board maintained interest rate at -0.1% on current accounts that financial institutions maintain at the bank.

Global Equities: Sentiments stayed supported amid optimism about US-China trade talks and possibility of more Chinese economic stimulus. Nasdaq and S&P 500 hit their best closing levels in five months on Friday.

Indian Economy: India's merchandise exports rose 2.4% to US\$ 26.67 billion in February 2019 over a year ago. Meanwhile, merchandise imports dipped 5.4% to US\$ 36.26 billion. The trade deficit plunged 22.0% to 17-month low of US\$ 9.60 billion in February 2019 from US\$ 12.30 billion in February 2018. Oil imports declined 8.1% to US\$ 9.38 billion, while the non-oil imports also fell 4.4% to US\$ 26.89 billion in February 2019 over February 2018. The share of oil imports in total imports was 25.9% in February 2019, compared with 26.6% in February 2018. The price of India's basket of crude oil rose 1.6% to US\$ 64.53 per barrel in February 2019 over February 2018. India's foreign exchange reserves increased by US\$ 0.26 billion to US\$402.04 billion in the week ended 08 March 2019. The foreign exchange reserves had stood at US\$ 401.78 a week ago.

Equity Markets: Local stocks ended with modest gains on Friday after volatile session of trade. Positive global stocks boosted sentiment. The Sensex settled above the psychological 38,000 level after moving above and below that level in intraday trade.

Corporate News: Larsen & Toubro Infotech has completed the acquisition of 100% shareholding of Ruletronics Systems, India (Ruletronics India), Ruletronics, UK (RuletronicsUK) and Ruletronics Systems Inc, US (Ruletronics US) by itself and through its wholly owned subsidiary Larsen & Toubro Infotech GmbH, Germany. Zydus Cadila has received the final approval from the USFDA to market Valsartan and Hydrochlorothiazide Tablets USP (US RLD – Diovan HCT Tablets) in the strengths of 80 mg/12.5 mg, 160 mg/12.5 mg, 160 mg/25 mg, 320 mg/12.5 mg, and 320 mg/25mg. The drug is used to treat high blood pressure. Dewan Housing Finance Corporation has entered into a share purchase agreement for disinvestment of its entire stakeholding of 1.92 crore shares or 30.63% of paid up capital in Avanse Financial Services to Olive Vine Investment, an affiliate of Warburg Pincus Group.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	279.8	270.6	(9.4)
MF(INR cr)	(238.8)	(451.5)	369.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	50,720	40,400	34,610
F&O(INR cr)	882,994	1,040,335	969,752

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.9	14.5	16.5
NSE VIX	15.9	15.4	15.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,381	1.6 %	20.8 %	Energy	16,046	0.1 %	20.7 %
IT	15,547	1.9 %	22.3 %	Pharma	9,222	0.4 %	7.0 %
Metals	3,008	0.2 %	(15.0) %	Finance	12,206	1.5 %	19.0 %
Auto	8,748	0.3 %	(20.9) %	PSU	3,099	1.9 %	8.6 %
FMCG	29,953	(1.7) %	13.0 %	Real Estate	252	(0.1) %	(15.1) %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Kotak Mah.	1,325	4.4 %	20.8 %	Dabur Indi	425	(3.1) %	26.7 %
I O C L	157	4.1 %	(7.7) %	Britannia	3,067	(2.6) %	20.1 %
Aditya Bir	100	3.8 %	(34.5) %	Marico	339	(2.3) %	3.1 %
H P C L	277	3.7 %	(19.6) %	Hind. Unil	1,698	(2.2) %	25.7 %
Cadila Hea	342	3.6 %	(11.1) %	S A I L	52	(2.2) %	(29.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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