



19 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,195	(1.6) %	10.4 %
BSE SENSEX	33,176	(1.5) %	10.9 %
CNX BANK	24,490	(1.2) %	13.7 %
CNX MIDCAP	19,055	(1.1) %	9.9 %
CNX SMALLCAP	8,112	(1.3) %	14.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,947	0.3 %	0.5 %
S&P 500	2,752	0.2 %	2.1 %
FTSE 100	7,164	0.3 %	(6.3) %
HANG SENG	31,502	(0.1) %	3.2 %
NIKKEI	21,677	(0.6) %	(7.8) %
SHANGHAI COMPOSITE	3,270	(0.7) %	(2.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.94	0.0 %	2.0 %
EUR/USD	1.23	(0.2) %	2.3 %
GBP/USD	1.39	0.1 %	3.2 %
USD/JPY	106.01	0.0 %	(6.0) %
USD/AUD	1.30	1.0 %	1.4 %
USD/SGD	1.32	0.2 %	(1.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	1.9 %	3.3 %
Gold(INR/10g)	30,299	(0.1) %	3.2 %
Gold Comex(USD/oz)	1,314	(0.2) %	0.4 %
SILVER(INR/1Kg)	37,980	(0.6) %	(1.6) %
Aluminium(USD/MT)	2,069	0.3 %	(8.3) %
Copper(USD/MT)	6,923	0.5 %	(3.6) %

FIXED INCOME

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

Global Economy: US industrial output jumped in February on a sharp increase in factory and mining output. Total production rose by 1.1% month-on-month, according to the Federal Reserve, pushing the year-on-year rate of increase to 4.4%. Together with upwards revisions to readings for several of the previous months, February's increase saw the rate of capacity utilisation rise by seven tenths of a percentage point to 78.1%. A preliminary report released by the University of Michigan showed an unexpected improvement in US consumer sentiment in the month of March. The reading on the consumer sentiment index for March came in at 102.0, up from the final February reading of 99.7. The report said the current economic conditions index jumped to 122.8 in March from 114.9 in February, while the index of consumer expectations fell to 88.6 from 90.0. Eurozone inflation eased more than estimated in February, final data from Eurostat showed Friday. Inflation slowed to revised 1.1% from 1.3% in January. A similar slower growth was last seen in December 2016. The flash estimate showed an annual inflation of 1.2% for February.

Global Equities: Upbeat economic data supported the US stock markets on Friday after a volatile week.

Indian Economy: The India's merchandise exports rose at moderate pace of 4.5% to US\$ 25.83 billion in February 2018 over a year ago. However, merchandise imports growth decelerated sharply to 10.4% at US\$ 37.81 billion. The trade deficit narrowed to five month low of US\$ 11.98 billion in February 2018 from US\$ 16.3 billion in January 2018, while increased from US\$ 8.90 billion in February 2017. Oil imports galloped 32.1% to US\$ 10.19 billion, while the non-oil imports rose 4.1% to US\$ 27.62 billion in February 2018 over February 2017. The share of oil imports in total imports was 27.0% in February 2018, compared with 23.0% in February 2017. The price of India's basket of crude oil increased 15.8% to US\$ 63.54 per barrel in February 2018 over February 2017.

Equity Markets: Local stocks extended losses. Market suffered steep losses in a broad-based sell-off, with the barometer index, the S&P BSE Sensex, and the Nifty 50 index, closing at over one-week low. Sentiment took a hit after Telegu Desam Party (TDP) reportedly decided to quit the ruling National Democratic Alliance (NDA) government. Today's slide on the bourses was led by index heavyweights HDFC, HDFC Bank, Reliance Industries (RIL) and ITC. Metal and mining stocks declined. Private bank stocks declined. Many PSU bank stocks rose.

Corporate News: Ramky Infra said that the company has bagged an EPC order of Rs 939.4 crore From NHAI in Srinagar. Private forecaster Weather Risk Management Services (WRMS) has said that the June-September rainfall would be largely on the 'positive side of normal' (normal to above normal), according to media reports. Local metal firms could be in focus after recent correction in global Copper prices.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(29.7)	124.6	10.4
MF(INR cr)	(273.0)	(75.8)	543.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	45,621	32,659	33,384
F&O(INR cr)	588,936	883,030	660,678

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.8	17.0	12.1
NSE VIX	15.2	14.9	12.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,490	(1.2) %	13.7 %	Energy	13,419	(1.8) %	13.5 %
IT	12,698	(0.5) %	19.9 %	Pharma	8,547	(1.4) %	(18.6) %
Metals	3,665	(2.4) %	18.0 %	Finance	10,211	(1.6) %	15.7 %
Auto	10,861	(1.7) %	9.5 %	PSU	2,932	(0.3) %	(16.8) %
FMCG	26,052	(1.2) %	10.2 %	Real Estate	315	(1.6) %	43.7 %

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>
Piramal En	2,492	1.7 %	28.7 %	Coal India	278	(5.9) %	(5.7) %
NMDC	126	1.6 %	(5.6) %	UltraTech	4,026	(3.9) %	(0.0) %
Idea Cellu	81	1.1 %	(4.8) %	I O C L	185	(3.8) %	(3.1) %
HCL Techno	968	0.9 %	11.7 %	Tata Motor	340	(3.8) %	(27.8) %
M & M	741	0.8 %	15.2 %	Tata Motor	189	(3.4) %	(32.6) %

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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