



19 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,462	0.0 %	12.2 %
BSE SENSEX	38,095	0.2 %	14.9 %
CNX BANK	29,596	0.0 %	21.7 %
CNX MIDCAP	17,814	0.0 %	(6.7) %
CNX SMALLCAP	6,545	0.0 %	(17.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,914	0.3 %	11.1 %
S&P 500	2,833	0.4 %	13.0 %
FTSE 100	7,299	1.0 %	8.4 %
HANG SENG	29,409	1.4 %	17.0 %
NIKKEI	21,585	0.6 %	10.3 %
SHANGHAI COMPOSITE	3,096	2.5 %	25.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.53	(1.2) %	(1.3) %
EUR/USD	1.13	0.3 %	(1.0) %
GBP/USD	1.33	0.3 %	4.2 %
USD/JPY	111.24	(0.5) %	1.5 %
USD/AUD	1.41	(0.3) %	(0.9) %
USD/SGD	1.35	(0.4) %	(1.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	0.6 %	27.0 %
Gold(INR/10g)	31,725	(0.8) %	0.6 %
Gold Comex(USD/oz)	1,307	0.4 %	1.3 %
SILVER(INR/1Kg)	37,614	(1.0) %	(1.7) %
Aluminium(USD/MT)	1,879	0.6 %	1.1 %
Copper(USD/MT)	6,492	1.3 %	11.2 %

FIXED INCOME

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

Global Economy: Homebuilder confidence in the US has held steady in the month of March, according to a report released by the National Association of Home Builders on Monday. The report said the NAHB/Wells Fargo Housing Market Index came in at 62 in March, unchanged from February. Eurozone's merchandise trade surplus for January reduced sharply from a year ago with the pace of increase in imports outpacing that of exports. The trade surplus fell to EUR 1.5 billion in January from EUR 3.1 billion in the same month last year. British Chambers of Commerce (BCC) downgraded its growth expectations for the UK economy. BCC forecast growth of just 1.2% in 2019 (down from 1.3%), which if realised would be the weakest growth in a decade. Japan's industrial production fell 3.4% month-on-month in January, following a 3.7% decline estimated earlier. Japan posted a merchandise trade surplus of 339.0 billion yen in February, the Ministry of Finance said on Monday. That exceeded expectations for a surplus of 305.1 billion yen following the 1.415 trillion yen deficit in January. Exports were down 1.2% on year to 6.384 trillion yen, following the 8.4% slide in the previous month. Imports plummeted an annual 6.7% to 6.045 trillion yen following the 0.6% drop a month earlier.

Global Equities: Markets started new week on supportive note as investors remain hopeful for a US-China trade deal. European stocks edged up with banks leading surge after German lenders Deutsche Bank and Commerzbank said they were in talks to merge.

Indian Economy: Government of India (GoI) has announced the sale (re-issue) of four dated securities for a total of Rs 18000 crore. Federation of Indian Export Organisations says that exporters managed to do well despite increasing protectionism, tough global conditions and constraints on the domestic front. IT sector will clock 7-9% growth rate in USD terms in FY2020 rating agency Icra stated.

Equity Markets: Local stocks logged gains for sixth straight session on Monday amid positive global cues. Strong foreign portfolio inflows in the domestic market and firmness in the rupee against the dollar also boosted sentiment. The barometer index, the S&P BSE Sensex, rose 70.75 points or 0.19% to 38,095.07. The Nifty 50 index rose 35.35 points or 0.31% to 11,462.20.

Corporate News: Aviation stocks would be in focus as DGCA has called a meeting with airlines to discuss rising airfares, according to media reports. HCL Technologies has entered into a shared services arrangement with Xerox Corporation pursuant to which Xerox will outsource (subject to compliance with European works council consultation and employment regulatory requirements) certain global administrative and support functions, including, among others, selected information technology and finance functions (excluding accounting). General insurers registered 23 percent growth in their premium at Rs 12,959.44 crore in February, data from IRDAI showed. The gross premium collected by all the 34 insurers in the general sector stood at Rs 10,573.70 crore during the same month a year ago.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	500.3	293.6	(7.2)
MF(INR cr)	(1,389.0)	(559.0)	362.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,806	40,437	34,636
F&O(INR cr)	1,046,899	1,040,932	970,075

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.1	14.4	16.5
NSE VIX	16.9	15.5	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,596	0.7 %	21.7 %	Energy	16,333	1.8 %	22.9 %
IT	15,359	(1.2) %	20.9 %	Pharma	9,205	(0.2) %	6.8 %
Metals	3,028	0.7 %	(14.4) %	Finance	12,270	0.5 %	19.6 %
Auto	8,627	(1.4) %	(22.0) %	PSU	3,118	0.6 %	9.2 %
FMCG	30,172	0.7 %	13.9 %	Real Estate	259	2.8 %	(12.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
SAIL	54	3.8 %	(26.8) %	Vodafone I	32	(4.9) %	(58.5) %
HPC L	287	3.6 %	(16.7) %	Lupin	754	(3.9) %	(2.9) %
IOCL	163	3.5 %	(4.5) %	Bandhan Ba	492	(3.8) %	3.5 %
Bajaj Fin.	2,930	2.4 %	61.1 %	General In	247	(2.8) %	(33.2) %
BPC L	406	2.3 %	(4.2) %	Maruti Suz	6,909	(2.5) %	(23.3) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
House Price Index (QoQ) (4Q)	19-03-2019	00:30	AUD	-	(0.015)
House Price Index (YoY) (4Q)	19-03-2019	00:30	AUD	-	(0.019)
RBA Minutes of March Policy Meeting (MAR)	19-03-2019	00:30	AUD	-	-
Westpac Leading Index (MoM) (FEB)	19-03-2019	23:30	AUD	-	(0.0001)
Exports (MoM) (FEB)	19-03-2019	07:00	CHF	-	0.006
Imports (MoM) (FEB)	19-03-2019	07:00	CHF	-	0.048
Swiss Watch Exports (YoY) (FEB)	19-03-2019	07:00	CHF	-	0.002
Euro-Zone Construction Output s.a. (MoM) (JAN)	19-03-2019	10:00	EUR	-	(0.004)
Euro-Zone Construction Output w.d.a. (YoY) (JAN)	19-03-2019	10:00	EUR	-	0.007
Euro-Zone Labour Costs (YoY) (4Q)	19-03-2019	10:00	EUR	-	0.025
Euro-Zone ZEW Survey (Economic Sentiment) (MAR)	19-03-2019	10:00	EUR	-	(16.6)
German ZEW Survey Current Situation (MAR)	19-03-2019	10:00	EUR	-	15
German ZEW Survey Expectations (MAR)	19-03-2019	10:00	EUR	-	(13.4)
Average Weekly Earnings (3M/YoY) (JAN)	19-03-2019	09:30	GBP	-	0.034
Claimant Count Rate (FEB)	19-03-2019	09:30	GBP	-	0.028
Employment Change 3M/3M (JAN)	19-03-2019	09:30	GBP	-	-
ILO Unemployment Rate 3Mths (JAN)	19-03-2019	09:30	GBP	-	0.04
Jobless Claims Change (FEB)	19-03-2019	09:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (JAN)	19-03-2019	09:30	GBP	-	0.034
BOJ Minutes of January Policy Meeting (JAN)	19-03-2019	23:50	JPY	-	-
BoP Current Account Balance (4Q)	19-03-2019	21:45	NZD	-	-
Current Account Gross Domestic Product Ratio YTD (4Q)	19-03-2019	21:45	NZD	-	(0.036)
Cap Goods Orders Nondef Ex Air (JAN F)	19-03-2019	14:00	USD	-	0.008
Cap Goods Ship Nondef Ex Air (JAN F)	19-03-2019	14:00	USD	-	0.008
Durable Goods Orders (JAN F)	19-03-2019	14:00	USD	-	0.004
Durables Ex Transportation (JAN F)	19-03-2019	14:00	USD	-	(0.001)
Factory Orders (JAN)	19-03-2019	14:00	USD	-	0.001
Factory Orders Ex Trans (JAN)	19-03-2019	14:00	USD	-	(0.006)



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