



20 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,094	(1.0) %	9.3 %
BSE SENSEX	32,923	(0.8) %	10.1 %
CNX BANK	24,245	(1.0) %	12.5 %
CNX MIDCAP	18,764	(1.5) %	8.3 %
CNX SMALLCAP	7,934	(2.2) %	12.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,611	(1.4) %	(0.9) %
S&P 500	2,713	(1.4) %	0.6 %
FTSE 100	7,043	(1.7) %	(7.9) %
HANG SENG	31,514	0.0 %	3.3 %
NIKKEI	21,481	(0.9) %	(8.6) %
SHANGHAI COMPOSITE	3,279	0.3 %	(2.1) %

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: Germany's robust economic momentum was likely sustained in the first quarter and continued to be led by the industry which remained strong, thanks to increased orders in the second half of last year, the Bundesbank said in its monthly report. The slight decline in the Ifo survey's expectations index is set to affect only the second quarter, the bank noted. The latest Ifo survey showed that the German business confidence weakened notably in February as near term outlook of firms deteriorated on political uncertainty and market turmoil. The Eurozone trade surplus came in at seasonally adjusted EUR 19.9 billion versus a EUR 23.2 billion surplus in December, data from Eurostat showed. This was the lowest since October 2017. Exports dropped 0.7% in January from December, while imports grew 1.1%. On an unadjusted basis, the trade balance showed a surplus of EUR 3.3 billion compared to a deficit of EUR 1.4 billion in the same period of 2017.

Global Equities: US stocks stumbled as tech shares crashed ahead of the US Federal Reserve's policy decision later in the week. Metals and energy counters also remained under stress.

Indian Economy: India's manufacturing sector witnessed an improvement in sales growth in the third quarter this fiscal on annual basis, though net profit has remained subdued due to lack of support from other income, stated a latest update from the RBI. The RBI said the information technology (IT) sector recorded a modest improvement in sales growth, although lower than a year ago. The services (non-IT) sector also showed signs of revival as reflected by positive sales growth. The sales of manufacturing companies rose by 14% in the October-December quarter of 2017-18, stated the central bank.

Equity Markets: The local stocks witnessed broad-based selling pressure on Monday. The Sensex settled below the psychological 33,000 level after slipping below that level in intraday trade. The Sensex fell for the fifth straight session while the Nifty declined for the fourth straight trading session. Both the Sensex, and the Nifty, hit lowest closing level in more than 12 weeks. Metal and bank shares witnessed selling pressure.

Corporate News: GAIL India Ltd's 'Urja Ganga' pipeline got extension till Guwahati in Assam stated media reports. Future Retail announced that Reserve Bank of India ('RBI') has issued a press release dated 19 March 2018 relating to increase in the limits for investment in the equity share capital of the Company by Registered Foreign Portfolio Investors (RPFIs) including Foreign Institutional Investors (FIIs) upto 49% of the paid-up capital of the Company. Granules India announced that USFDA has approved the Abbreviated New Drug Application (ANDA) filed by the company for Metformin Extended Release Tablets 500 mg and 750 mg. Weak Sugar prices and bumper sugar production have pushed cane arrears towards a record high above Rs 14000 crore till the end of January, according to a statement issued by the Indian Sugar Mills Association (ISMA) on Monday.



FUND FLOWS

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

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,938	32,515	33,373
F&O(INR cr)	625,236	861,548	660,530

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.8	17.0	12.1
NSE VIX	15.8	14.9	12.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,245	(1.0) %	12.5 %	Energy	13,324	(0.7) %	12.7 %
IT	12,421	(2.2) %	17.3 %	Pharma	8,513	(0.4) %	(19.0) %
Metals	3,567	(2.7) %	14.8 %	Finance	10,113	(1.0) %	14.6 %
Auto	10,787	(0.7) %	8.7 %	PSU	2,855	(2.6) %	(19.0) %
FMCG	25,936	(0.4) %	9.7 %	Real Estate	306	(2.9) %	39.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
NTPC	167	1.3 %	1.4 %	Bank of Ba	133	(7.3) %	(22.7) %
Maruti Suz	8,774	1.1 %	44.5 %	NMDC	118	(6.7) %	(11.9) %
Power Grid	194	1.0 %	(1.0) %	S A I L	69	(5.4) %	9.2 %
Larsen & T	1,280	0.8 %	15.6 %	DLF	214	(5.3) %	46.0 %
Hind. Unil	1,309	0.8 %	42.2 %	HCL Techno	927	(4.2) %	7.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
House Price Index (QoQ) (4Q)	20-03-2018	0:30	AUD	-	(0.002)
House Price Index (YoY) (4Q)	20-03-2018	0:30	AUD	-	0.083
RBA March Meeting Minutes	20-03-2018	0:30	AUD	-	-
RBA's Bullock Takes Part in Panel in Sydney	20-03-2018	4:15	AUD	-	-
Westpac Leading Index (MoM) (FEB)	20-03-2018	23:30	AUD	-	(0.0024)
Wholesale Trade Sales (MoM) (JAN)	20-03-2018	12:30	CAD	-	(0.005)
Exports (MoM) (FEB)	20-03-2018	7:00	CHF	-	(0.051)
Imports (MoM) (FEB)	20-03-2018	7:00	CHF	-	0.038
SECO March 2018 Economic Forecasts	20-03-2018	6:45	CHF	-	-
Swiss Watch Exports (YoY) (FEB)	20-03-2018	7:00	CHF	-	0.126
Euro-Zone Consumer Confidence (MAR A)	20-03-2018	15:00	EUR	-	0.1
Euro-Zone ZEW Survey (Economic Sentiment) (MAR)	20-03-2018	10:00	EUR	-	29.3
German Producer Price Index (MoM) (FEB)	20-03-2018	7:00	EUR	-	0.005
German Producer Price Index (YoY) (FEB)	20-03-2018	7:00	EUR	-	0.021
German ZEW Survey Current Situation (MAR)	20-03-2018	10:00	EUR	-	92.3
German ZEW Survey Expectations (MAR)	20-03-2018	10:00	EUR	-	17.8
Consumer Price Index (MoM) (FEB)	20-03-2018	9:30	GBP	-	(0.005)
Consumer Price Index (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.03
Core Consumer Price Index (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.027
CPIH (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.027
House Price Index (YoY) (JAN)	20-03-2018	9:30	GBP	-	0.052
Producer Price Index Input n.s.a. (MoM) (FEB)	20-03-2018	9:30	GBP	-	0.007
Producer Price Index Input n.s.a. (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.047
Producer Price Index Output Core n.s.a. (MoM) (FEB)	20-03-2018	9:30	GBP	-	0.003
Producer Price Index Output Core n.s.a. (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.022
Producer Price Index Output n.s.a. (MoM) (FEB)	20-03-2018	9:30	GBP	-	0.001
Producer Price Index Output n.s.a. (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.028
Retail Price Index (FEB)	20-03-2018	9:30	GBP	-	276
Retail Price Index (MoM) (FEB)	20-03-2018	9:30	GBP	-	(0.000)



Retail Price Index (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.04
Retail Price Index Ex Mort Int.Payments (YoY) (FEB)	20-03-2018	9:30	GBP	-	0.04
Coincident Index (JAN F)	20-03-2018	5:00	JPY	-	114
Convenience Store Sales (YoY) (FEB)	20-03-2018	7:00	JPY	-	0.001
Leading Index CI (JAN F)	20-03-2018	5:00	JPY	-	104.8
Machine Tool Orders (YoY) (FEB F)	20-03-2018	6:00	JPY	-	0.395
Net Migration s.a. (FEB)	20-03-2018	21:45	NZD	-	6210
U.S. to Sell 4-Week Bills	20-03-2018	15:30	USD	-	-

..... End of Report

