



21 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,190	0.7 %	10.3 %
BSE SENSEX	32,997	0.2 %	11.0 %
CNX BANK	24,375	0.9 %	13.1 %
CNX MIDCAP	19,008	0.9 %	9.7 %
CNX SMALLCAP	8,053	1.2 %	13.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,727	0.5 %	(0.4) %
S&P 500	2,717	0.2 %	0.8 %
FTSE 100	7,061	0.3 %	(7.7) %
HANG SENG	31,550	0.1 %	3.4 %
NIKKEI	21,381	(0.5) %	(9.0) %
SHANGHAI COMPOSITE	3,291	0.4 %	(1.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.20	0.4 %	2.4 %
EUR/USD	1.23	(0.3) %	2.0 %
GBP/USD	1.40	0.5 %	3.7 %
USD/JPY	106.46	0.4 %	(5.6) %
USD/AUD	1.30	0.2 %	1.6 %
USD/SGD	1.32	0.1 %	(1.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	0.0 %	3.3 %
Gold(INR/10g)	30,251	0.3 %	3.0 %
Gold Comex(USD/oz)	1,316	0.2 %	0.6 %
SILVER(INR/1Kg)	37,948	0.1 %	(1.7) %
Aluminium(USD/MT)	2,071	0.1 %	(8.2) %
Copper(USD/MT)	6,792	(1.9) %	(5.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

Global Economy: Japan's leading index, which measures the future economic activity, dropped to a 6-month low of 105.6 in January from 106.8 in December, latest figures from the Cabinet Office showed Tuesday. The coincident index that reflects the current economic activity fell to 114.9 in January from 119.7 in the previous month. The January figure was revised up from 114.0. The lagging index came in at 119.4 in January versus 118.9 in the preceding month. Germany's economic confidence deteriorated sharply to 5.1 in March from 17.8 in February, survey data from the Mannheim-based think tank ZEW showed Tuesday. This was the lowest score since September 2016 and well below the expected level of 13.0. The current conditions index came in at 90.7 in March versus 92.3 in the previous month. The reading was seen easing moderately to 90.

Global Equities: The US Federal Reserve's two-day monetary policy meeting scheduled on March 20-21 is weighing on markets. Strengthening labor market and a steady increase in price pressures could pave the way for the Federal Reserve to raise interest rates in upcoming meeting.

Indian Economy: The Union Minister of Mines Narendra Singh Tomar has said that there has been a notable turn around in the mining sector ever since government has taken initiative for policy reforms. In the current year up to January, 2018 the mineral production in terms of volume has registered a growth of 6% when compared to same period last year, which he described is a robust one. Addressing the 3rd National Conclave on Mines & Minerals today in New Delhi, he emphasized the underlying importance of the mining sector as it provides basic raw materials to many important industries.

Equity Markets: Local indices settled with small gains after a volatile session of trade. The Sensex settled below the psychological 33,000 mark after gyrating above and below that level in intraday trade. PSU bank stocks saw mixed trend. Most IT shares rose. Trading was volatile as investors were indecisive ahead of the US Fed rate review meet. There is a possibility that the US central bank may hike policy rate and signal that three more are in store this year.

Corporate News: Tata Consultancy Services announced that Saudi Real Estate Refinance Company (SRC) has implemented a single, integrated technology platform for its core operations to refinance real estate, a first of its nature deployment in the Middle East region. Local oil refiners and oil marketing companies could be in focus as a staggered recovery in equities in Europe and bargain buying lifted oil prices. WTI Oil futures yet again witnessed steady buying around \$60 per barrel. Sterlite Power said it has acquired the Rs 1,500 crore Goa-Tamnar Transmission Project. The project will deliver an incremental 400kV feed to Goa and scale up the transmission network for power evacuation from generation projects pooled at Raigarh (Chhattisgarh). GE Power India said it has been awarded a contract worth Rs 309 crore by NTPC to install its FGD system at Phase-I (2X800 MW) of its Super Thermal Power Project (STPP) in Telangana.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	78.9	123.9	11.3
MF(INR cr)	(1,075.7)	182.8	552.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,162	32,411	33,364
F&O(INR cr)	644,895	844,882	660,465

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.0	17.2	12.1
NSE VIX	15.6	15.0	12.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,168	(0.3) %	12.2 %	Energy	13,245	(0.6) %	12.1 %
IT	12,609	1.5 %	19.0 %	Pharma	8,579	0.8 %	(18.3) %
Metals	3,555	(0.3) %	14.5 %	Finance	10,133	0.2 %	14.8 %
Auto	10,849	0.6 %	9.3 %	PSU	2,864	0.3 %	(18.8) %
FMCG	26,044	0.4 %	10.2 %	Real Estate	304	(0.4) %	38.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Marico	319	5.2 %	7.6 %	Vedanta	287	(6.5) %	5.3 %
Bharti Inf	342	5.1 %	3.7 %	Oil India	327	(2.9) %	(1.0) %
S A I L	72	4.9 %	14.5 %	I O C L	174	(2.3) %	(8.8) %
Tech Mahin	633	3.9 %	39.8 %	Oracle Fin	3,798	(2.1) %	0.3 %
Eicher Mot	28,360	3.5 %	11.0 %	Shriram Tr	1,378	(1.9) %	24.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (FEB)	21-03-2018	0:00	AUD	-	0.012
Money Supply M3 (YoY) (FEB)	21-03-2018	8:00	CHF	-	0.041
Average Weekly Earnings (3M/YoY) (JAN)	21-03-2018	9:30	GBP	-	0.025
CBI Trends Selling Prices (MAR)	21-03-2018	11:00	GBP	-	25
CBI Trends Total Orders (MAR)	21-03-2018	11:00	GBP	-	10
Central Government NCR (FEB)	21-03-2018	9:30	GBP	-	-
Claimant Count Rate (FEB)	21-03-2018	9:30	GBP	-	0.023
Employment Change 3M/3M (JAN)	21-03-2018	9:30	GBP	-	-
ILO Unemployment Rate 3Mths (JAN)	21-03-2018	9:30	GBP	-	0.044
Jobless Claims Change (FEB)	21-03-2018	9:30	GBP	-	-
PSNB ex Banking Groups (FEB)	21-03-2018	9:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (FEB)	21-03-2018	9:30	GBP	-	-
Public Sector Net Borrowing (FEB)	21-03-2018	9:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (JAN)	21-03-2018	9:30	GBP	-	0.025
Credit Card Spending (MoM) (FEB)	21-03-2018	2:00	NZD	-	(0.006)
Credit Card Spending (YoY) (FEB)	21-03-2018	2:00	NZD	-	0.046
RBNZ Official Cash Rate (MAR 22)	21-03-2018	20:00	NZD	-	0.0175
Current Account Balance (4Q)	21-03-2018	12:30	USD	-	-
DOE Cushing OK Crude Inventory (MAR 16)	21-03-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAR 16)	21-03-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (MAR 16)	21-03-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (MAR 16)	21-03-2018	14:30	USD	-	-
Existing Home Sales (FEB)	21-03-2018	14:00	USD	-	-
Existing Home Sales (MoM) (FEB)	21-03-2018	14:00	USD	-	(0.032)
Fed Chair Jerome Powell News Conference	21-03-2018	18:30	USD	-	-
FOMC Rate Decision (Lower Bound) (MAR 21)	21-03-2018	18:00	USD	-	0.0125
FOMC Rate Decision (Upper Bound) (MAR 21)	21-03-2018	18:00	USD	-	0.015
MBA Mortgage Applications (MAR 16)	21-03-2018	11:00	USD	-	0.009



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