



22 Mar.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,155	0.3 %	9.9 %
BSE SENSEX	33,136	0.4 %	10.8 %
CNX BANK	24,256	0.4 %	12.6 %
CNX MIDCAP	18,907	0.4 %	9.1 %
CNX SMALLCAP	7,966	0.1 %	12.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,682	(0.2) %	(0.6) %
S&P 500	2,712	(0.2) %	0.6 %
FTSE 100	7,039	(0.3) %	(8.0) %
HANG SENG	31,415	(0.4) %	2.9 %
NIKKEI	21,381	(0.5) %	(9.0) %
SHANGHAI COMPOSITE	3,281	(0.3) %	(2.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.21	0.1 %	2.4 %
EUR/USD	1.24	0.1 %	2.9 %
GBP/USD	1.42	0.9 %	4.8 %
USD/JPY	105.64	(0.6) %	(6.3) %
USD/AUD	1.29	(0.5) %	0.9 %
USD/SGD	1.31	(0.2) %	(1.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	1.7 %	5.0 %
Gold(INR/10g)	30,300	0.2 %	3.2 %
Gold Comex(USD/oz)	1,313	(0.2) %	0.4 %
SILVER(INR/1Kg)	37,927	(0.1) %	(1.8) %
Aluminium(USD/MT)	2,073	0.1 %	(8.1) %
Copper(USD/MT)	6,784	(0.1) %	(5.5) %

**FIXED INCOME**

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

**Global Economy:** The US Federal Reserve announced its first interest rate increase of 2018 on strong labor market and strength in the broader economy. The Fed raised its benchmark interest rate by a quarter of a percentage point, to a range of 1.5% to 1.75%. The Fed reiterated its plan to raise interest rates gradually. The central bank continues to project three rate hikes in 2018. The central bank now projects three rate hikes in 2019, up from the previous projection of two. German gross domestic product is forecast to grow 2.6% this year after 2.2% increase in 2017; the Munich-based Ifo Institute said its Spring forecast. The pace of growth is expected to ease to 2.1% next year. Strong economic growth is set to continue in the months ahead, as demand for the country's exports are expected to improve.

**Global Equities:** DOW fell from intraday highs near 25000 following the Fed decision and closed in red. Tech stocks remained in continued pressure.

**Indian Economy:** Domestic travel and tourism sectors together generated 25.9 million jobs in 2017, contributing \$75.8 billion (around Rs 5 lakh crore) to the country's Gross Domestic Product (GDP) in the same year, a report by Indian industry body Ficci and services firm KPMG said on Wednesday. Directly contributing 25.9 million jobs, travel and tourism sectors are among the largest employment generators in the country, said the report.

**Equity Markets:** Local stocks edged up and closed with modest gains. The Sensex settled above the psychological 33,000 mark, a day after falling below that level. Domestic stocks rose for second day in a row. Bank stocks were mostly higher. Telecom shares rose. The market breadth, indicating the overall health of the market, turned negative from positive in late trade. On BSE, 1,417 shares fell and 1,286 shares rose. A total of 157 shares were unchanged.

**Corporate News:** Mahindra & Mahindra Financial Services announced that a meeting of the duly authorised Committee held on 21 March 2018 approved the allotment of Secured Redeemable Non-Convertible Debentures ("NCDs") of the face value of Rs. 10,00,000 each, at par, aggregating to Rs. 93 crore. Sun Pharmaceutical Industries (Sun Pharma) announced that the United States Food and Drug Administration (FDA) has approved ILUMYA (tildrakizumab-asmn) for the treatment of adults with moderate-to-severe plaque psoriasis who are candidates for systemic therapy or phototherapy. Private equity investments witnessed a near two-time jump in February with transactions worth \$1.3 billion taking the deal tally for the first two months of this year to \$2.3 billion, tax and advisory firm Grant Thornton said. There were 62 PE deals worth \$1,330 million, while in the corresponding period last year there were 45 such transactions worth \$588 million.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	75.7	120.2	11.6
MF(INR cr)	(1,075.7)	182.8	552.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,688	32,360	33,357
F&O(INR cr)	814,332	842,700	661,103

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.2	17.3	12.1
NSE VIX	15.1	15.0	12.9

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,256	0.4 %	12.6 %	Energy	13,325	0.6 %	12.7 %
IT	12,609	(0.0) %	19.0 %	Pharma	8,525	(0.6) %	(18.8) %
Metals	3,539	(0.5) %	14.0 %	Finance	10,200	0.7 %	15.6 %
Auto	10,834	(0.1) %	9.2 %	PSU	2,862	(0.1) %	(18.8) %
FMCG	26,093	0.2 %	10.4 %	Real Estate	307	0.8 %	40.0 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharti Air	418	4.4 %	22.4 %	Sun TV Net	873	(2.2) %	9.8 %
Bajaj Fin.	1,705	2.9 %	44.2 %	Shree Ceme	16,118	(1.9) %	(6.1) %
ICICI Pru	382	2.8 %	(0.9) %	GlaxoSmith	6,493	(1.8) %	25.3 %
Idea Cellu	79	2.6 %	(7.0) %	Tata Steel	582	(1.8) %	25.8 %
NTPC	170	2.4 %	3.5 %	Adani Port	364	(1.7) %	6.3 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (FEB)	22-03-2018	0:30	AUD	-	-
Full Time Employment Change (FEB)	22-03-2018	0:30	AUD	-	-
Part Time Employment Change (FEB)	22-03-2018	0:30	AUD	-	-
Participation Rate (FEB)	22-03-2018	0:30	AUD	-	0.656
Unemployment Rate (FEB)	22-03-2018	0:30	AUD	-	0.055
Bank of Canada Senior Deputy Governor Carolyn Wilkins Speech	22-03-2018	19:00	CAD	-	-
SNB Publishes Annual Report	22-03-2018	6:30	CHF	-	-
ECB Publishes Economic Bulletin	22-03-2018	9:00	EUR	-	-
ECB's Lautenschlaeger speaks in Brussels	22-03-2018	8:30	EUR	-	-
Euro-Zone Current Account n.s.a. (euros) (JAN)	22-03-2018	9:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (JAN)	22-03-2018	9:00	EUR	-	-
German IFO Business Climate (MAR)	22-03-2018	9:00	EUR	-	115.4
German IFO Current Assessment (MAR)	22-03-2018	9:00	EUR	-	126.3
German IFO Expectations (MAR)	22-03-2018	9:00	EUR	-	105.4
Markit Eurozone Composite PMI (MAR P)	22-03-2018	9:00	EUR	-	57.1
Markit Eurozone Manufacturing PMI (MAR P)	22-03-2018	9:00	EUR	-	58.6
Markit Eurozone Services PMI (MAR P)	22-03-2018	9:00	EUR	-	56.2
Markit France Composite PMI (MAR P)	22-03-2018	8:00	EUR	-	57.3
Markit France Manufacturing PMI (MAR P)	22-03-2018	8:00	EUR	-	55.9
Markit France Services PMI (MAR P)	22-03-2018	8:00	EUR	-	57.4
Markit Germany Services PMI (MAR P)	22-03-2018	8:30	EUR	-	55.3
Markit/BME Germany Composite PMI (MAR P)	22-03-2018	8:30	EUR	-	57.6
Markit/BME Germany Manufacturing PMI (MAR P)	22-03-2018	8:30	EUR	-	60.6
Bank of England Bank Rate (MAR 22)	22-03-2018	12:00	GBP	-	0.005
BOE Asset Purchase Target (MAR)	22-03-2018	12:00	GBP	-	-
BOE Corporate Bond Target (MAR)	22-03-2018	12:00	GBP	-	-
BOE's Ramsden speaks in London.	22-03-2018	17:00	GBP	-	-
Retail Sales Ex Auto Fuel (MoM) (FEB)	22-03-2018	9:30	GBP	-	0.001
Retail Sales Ex Auto Fuel (% YoY) (FEB)	22-03-2018	9:30	GBP	-	0.015



Retail Sales Inc Auto Fuel (MoM) (FEB)	22-03-2018	9:30	GBP	-	0.001
Retail Sales Inc Auto Fuel (YoY) (FEB)	22-03-2018	9:30	GBP	-	0.016
All Industry Activity Index (MoM) (JAN)	22-03-2018	4:30	JPY	-	0.005
BOJ Outright Bond Purchase 10~25 Years	22-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	22-03-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	22-03-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (MAR 16)	22-03-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAR 16)	22-03-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAR 16)	22-03-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAR 16)	22-03-2018	23:50	JPY	-	-
National Consumer Price Index (YoY) (FEB)	22-03-2018	23:30	JPY	-	0.014
National Consumer Price Index Ex Fresh Food, Energy (YoY) (FEB)	22-03-2018	23:30	JPY	-	0.004
National Consumer Price Index Ex-Fresh Food (YoY) (FEB)	22-03-2018	23:30	JPY	-	0.009
Nationwide Department Store Sales (YoY) (FEB)	22-03-2018	5:30	JPY	-	(0.012)
Nikkei Japan PMI Manufacturing (MAR P)	22-03-2018	0:30	JPY	-	54.1
Supermarket Sales (YoY) (FEB)	22-03-2018	5:00	JPY	-	0.006
Tokyo Department Store Sales (YoY) (FEB)	22-03-2018	5:30	JPY	-	(0.002)
Continuing Claims (MAR 10)	22-03-2018	12:30	USD	-	-
EIA Natural Gas Storage Change (MAR 16)	22-03-2018	14:30	USD	-	(93)
EIA Working Natural Gas Implied Flow (MAR 16)	22-03-2018	14:30	USD	-	(93)
House Price Index (MoM) (JAN)	22-03-2018	13:00	USD	-	0.003
Initial Jobless Claims (MAR 17)	22-03-2018	12:30	USD	-	-
Kansas City Fed Manf. Activity (MAR)	22-03-2018	15:00	USD	-	17
Leading Index (FEB)	22-03-2018	14:00	USD	-	0.01
Markit US Composite PMI (MAR P)	22-03-2018	14:45	USD	-	55.8
Markit US Manufacturing PMI (MAR P)	22-03-2018	13:45	USD	-	55.3
Markit US Services PMI (MAR P)	22-03-2018	14:45	USD	-	55.9
U.S. to Sell USD11 Bln 10-Year TIPS Reopening	22-03-2018	17:00	USD	-	-

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