



22 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,521	0.0 %	12.8 %
BSE SENSEX	38,387	0.1 %	15.7 %
CNX BANK	29,832	0.0 %	22.6 %
CNX MIDCAP	17,847	0.0 %	(6.5) %
CNX SMALLCAP	6,591	0.0 %	(16.9) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,963	0.8 %	11.3 %
S&P 500	2,855	1.1 %	13.9 %
FTSE 100	7,355	0.9 %	9.2 %
HANG SENG	29,072	(0.9) %	15.7 %
NIKKEI	21,609	0.2 %	10.5 %
SHANGHAI COMPOSITE	3,101	0.4 %	25.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.96	0.6 %	(0.7) %
EUR/USD	1.13	0.1 %	(0.9) %
GBP/USD	1.33	(0.1) %	4.0 %
USD/JPY	111.58	0.3 %	1.8 %
USD/AUD	1.41	0.4 %	(0.5) %
USD/SGD	1.35	0.1 %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	1.6 %	28.9 %
Gold(INR/10g)	31,812	(0.4) %	0.9 %
Gold Comex(USD/oz)	1,309	0.3 %	1.4 %
SILVER(INR/1Kg)	37,713	(0.7) %	(1.4) %
Aluminium(USD/MT)	1,891	(0.9) %	1.8 %
Copper(USD/MT)	6,520	0.3 %	11.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	(0.1) %	(0.1) %

Global Economy: The US Commerce Department said factory orders rose by 0.1% in January, matching the gain in December. Germany's investor confidence rose sharply in March, reversing a steep fall in the previous month, to its highest level in a year, preliminary data from the ZEW - Leibniz Centre for European Economic Research showed on Tuesday. The ZEW Indicator of Economic Sentiment for Germany rose to -3.6 from -13.4 in February. A panel of economic advisers to the German government known as the "wise men" slashed the growth projection for this year to 0.8% from 1.5% predicted in November. The group, officially called the German Council of Economic Experts, sees 1.7% expansion for next year. UK unemployment rate fell below 4% for the first time since 1975, according to official figures. The Office for National Statistics said the jobless rate was 3.9% in the three months to January, down from 4% at the end of 2018. The wages excluding bonuses rose by 3.4%, unchanged on the previous month. Unemployment fell by 35,000 to 1.34 million and the number of people in work increased by 222,000 - the fastest pace of hiring in more than three years. The proportion of people in paid work edged up from 75.3% to 76.1% - the highest employment rate on record.

Global Equities: Markets have shifted their attention on the FOMC meet. Overall moves have remained cautious this week with Brexit also weighing on the sentiment.

Indian Economy: India's fuel product consumption or sales improved 3.8% to 17.42 mt in February 2019 over a year ago. LPG sales increased 14.2% to 2.22 mt, naphtha 25.3% to 1.29 mt, diesel 2.7% to 6.72 mt and petrol 8.0% to 2.26 mt. The consumption of other products also moved up 10.8% to 0.84 mt, ATF 10.6% to 0.68 mt, fuel oil 4.7% to 0.53 mt and light diesel oil (LDO) 21.4% to 0.06 mt. Consumption or sales of fuel products increased 3.2% to 193.53 mt in April-February 2019 over April-February 2018. Sales of diesel increased 3.0% to 75.91 mt, other products 28.5% to 9.58 mt, petrol 8.1% to 25.71 mt, naphtha 11.8% to 13.07 mt, and LPG 6.4% to 22.65 mt.

Equity Markets: Local stocks extended gains for seventh straight trading session amid support from index pivots, Reliance Industries, ITC and Infosys. Most auto shares declined. The Nifty ended above 11,500 mark. The barometer index, the S&P BSE Sensex, gained 268.40 points or 0.70% to 38,363.47. The Nifty 50 index rose 70.20 points or 0.61% to 11,532.40.

Corporate News: Kaveri Seed Company announced the commencement of its corn cob drying facility at Molangur - Karimnagar in Telangana. Zydus Cadila has received the final approval from the USFDA to market Acyclovir Ointment USP. It will be manufactured at the group's Topical manufacturing facility at Ahmedabad. V-Mart Retail has opened two retail stores one in the state of Uttar Pradesh and one in the state of West Bengal. This takes the total number of stores to 209 Stores in 166 Cities across 17 states and total tally of Uttar Pradesh is 84 stores and West Bengal is 12 stores.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	319.3	301.7	(4.3)
MF(INR cr)	(539.5)	(561.7)	354.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,425	40,508	34,688
F&O(INR cr)	1,885,084	1,108,170	974,290

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.6	14.3	16.5
NSE VIX	16.0	15.7	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,832	0.2 %	22.6 %	Energy	16,397	(1.2) %	23.4 %
IT	15,599	0.7 %	22.8 %	Pharma	9,265	0.2 %	7.5 %
Metals	2,996	(1.0) %	(15.4) %	Finance	12,351	0.3 %	20.4 %
Auto	8,445	(1.4) %	(23.6) %	PSU	3,190	0.4 %	11.8 %
FMCG	30,297	(0.4) %	14.3 %	Real Estate	265	2.4 %	(10.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	1,424	7.3 %	7.1 %	H P C L	275	(5.4) %	(20.1) %
Indiabulls	733	5.0 %	(41.1) %	Zee Entert	443	(4.8) %	(23.4) %
Vodafone I	33	3.3 %	(57.5) %	B P C L	389	(4.6) %	(8.1) %
DLF	199	2.8 %	(0.8) %	Oil India	175	(4.3) %	(22.9) %
Hindalco I	207	2.4 %	(1.9) %	NTPC	129	(4.2) %	(9.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (FEB)	22-03-2019	12:30	CAD	-	133.6
Consumer Price Index (YoY) (FEB)	22-03-2019	12:30	CAD	-	0.014
Consumer Price Index Core - Median (YoY) (FEB)	22-03-2019	12:30	CAD	-	0.018
Consumer Price Index Core - Trim (YoY) (FEB)	22-03-2019	12:30	CAD	-	0.019
Consumer Price Index Core (YoY) (FEB)	22-03-2019	12:30	CAD	-	0.019
Consumer Price Index n.s.a. (MoM) (FEB)	22-03-2019	12:30	CAD	-	0.001
Retail Sales (MoM) (JAN)	22-03-2019	12:30	CAD	-	(0.001)
Retail Sales Ex Auto (MoM) (JAN)	22-03-2019	12:30	CAD	-	(0.005)
Markit France Composite PMI (MAR P)	22-03-2019	08:15	EUR	-	50.4
Markit France Manufacturing PMI (MAR P)	22-03-2019	08:15	EUR	-	51.5
Markit France Services PMI (MAR P)	22-03-2019	08:15	EUR	-	50.2
Markit Germany Services PMI (MAR P)	22-03-2019	08:30	EUR	-	55.3
Markit/BME Germany Composite PMI (MAR P)	22-03-2019	08:30	EUR	-	52.8
Markit/BME Germany Manufacturing PMI (MAR P)	22-03-2019	08:30	EUR	-	47.6
Euro-Zone Current Account s.a. (euros) (JAN)	22-03-2019	09:00	EUR	-	-
Markit Eurozone Composite PMI (MAR P)	22-03-2019	09:00	EUR	-	51.9
Markit Eurozone Manufacturing PMI (MAR P)	22-03-2019	09:00	EUR	-	49.3
Markit Eurozone Services PMI (MAR P)	22-03-2019	09:00	EUR	-	52.8
Nikkei Japan PMI Manufacturing (MAR P)	22-03-2019	00:30	JPY	-	48.9
Coincident Index (JAN F)	22-03-2019	05:00	JPY	-	97.9
Leading Index CI (JAN F)	22-03-2019	05:00	JPY	-	95.9
Supermarket Sales (YoY) (FEB)	22-03-2019	05:00	JPY	-	(0.034)
Nationwide Department Store Sales (YoY) (FEB)	22-03-2019	05:30	JPY	-	(0.029)
Tokyo Department Store Sales (YoY) (FEB)	22-03-2019	05:30	JPY	-	(0.029)
Bi-Weekly Core CPI (MAR 15)	22-03-2019	14:00	MXN	-	0.0019
Bi-Weekly CPI (MAR 15)	22-03-2019	14:00	MXN	-	0.0014
Bi-Weekly CPI (YoY) (MAR 15)	22-03-2019	14:00	MXN	-	0.0399
Markit US Composite PMI (MAR P)	22-03-2019	13:45	USD	-	55.5
Markit US Manufacturing PMI (MAR P)	22-03-2019	13:45	USD	-	52



Markit US Services PMI (MAR P)	22-03-2019	13:45	USD	-	56
Existing Home Sales (FEB)	22-03-2019	14:00	USD	-	-
Existing Home Sales (MoM) (FEB)	22-03-2019	14:00	USD	-	(0.012)
Wholesale Inventories (MoM) (JAN)	22-03-2019	14:00	USD	-	0.011
Wholesale Trade Sales (MoM) (JAN)	22-03-2019	14:00	USD	-	(0.01)
Baker Hughes U.S. Rig Count (MAR 22)	22-03-2019	17:00	USD	-	1026
Monthly Budget Statement (FEB)	22-03-2019	18:00	USD	-	-

..... End of Report

