



23 Mar.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 10,010 | (1.0) % | 8.4 % |
| BSE SENSEX | 33,006 | (0.4) % | 9.2 % |
| CNX BANK | 23,778 | (1.5) % | 10.3 % |
| CNX MIDCAP | 18,449 | (1.6) % | 6.4 % |
| CNX SMALLCAP | 7,696 | (2.0) % | 8.8 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| DOW JONES | 23,958 | (2.9) % | (3.5) % |
| S&P 500 | 2,644 | (2.5) % | (1.9) % |
| FTSE 100 | 6,953 | (1.2) % | (9.1) % |
| HANG SENG | 31,071 | (1.1) % | 1.8 % |
| NIKKEI | 21,592 | 1.0 % | (8.1) % |
| SHANGHAI COMPOSITE | 3,263 | (0.5) % | (2.5) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 65.11 | (0.1) % | 2.3 % |
| EUR/USD | 1.23 | 0.6 % | 2.7 % |
| GBP/USD | 1.41 | 0.8 % | 4.5 % |
| USD/JPY | 104.84 | (1.5) % | (7.0) % |
| USD/AUD | 1.30 | (0.3) % | 1.4 % |
| USD/SGD | 1.31 | (0.3) % | (1.5) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|-------|---------|
| WTI Crude(USD/bbl) | 65 | 2.8 % | 8.0 % |
| Gold(INR/10g) | 30,495 | 0.6 % | 3.9 % |
| Gold Comex(USD/oz) | 1,336 | 1.7 % | 2.1 % |
| SILVER(INR/1Kg) | 38,409 | 1.3 % | (0.5) % |
| Aluminium(USD/MT) | 2,057 | 0.0 % | (8.8) % |
| Copper(USD/MT) | 6,675 | 0.0 % | (7.0) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec US 10 | 2.9 | (0.0) % | 0.4 % |

Global Economy: The Conference Board said its leading economic index rose by 0.6% following a 0.8% increase in January. Eurozone private sector expanded at the weakest pace in more than a year in March, flash data from IHS Markit showed. The composite output index dropped to 55.3 in March from 57.1 in February. The score signaled the weakest growth in the private sector since January 2017. The reading was expected to ease moderately to 56.8. Nonetheless, a score above 50 indicates expansion. The services Purchasing Managers' Index slid to a 5-month low of 55.0 from 56.2 in February. The expected reading was 56.0. Likewise, the manufacturing PMI came in at 56.6 in March versus 58.6 in February. This was the lowest in 8 months and also below forecast of 58.1. German business sentiment index dropped to 114.7 in March from February's initially estimated 115.4, reports said citing survey data from Ifo institute on Thursday.

Global Equities: US stocks tumbled with DOW falling under 24000 levels as selling continued on global trade fears. US President Donald Trump signed a presidential memorandum on Thursday that could impose tariffs on up to \$60 billion of imports from China.

Indian Economy: Non-Compliant NBFCs which have not fulfilled their obligations under PML Rules asked to do so. Prevention of Money Laundering Act, 2002 (PMLA) and the Rules impose obligation on reporting entities (RE's) including Non-Banking Financial Companies (NBFC's) to verify identity of clients, maintain records and furnish information to FIU-IND. To facilitate the filing of prescribed reports under PMLA, FIU-IND has developed a platform called FINnet Gateway portal. In order to file the prescribed reports, it is necessary for a Reporting Entity (RE) to register itself and its Principal Officer (PO) through the FINnet Gateway portal of FIU-IND.

Equity Markets: Local markets logged modest losses in a volatile session of trade. The Sensex finished a tad above the psychologically important 33,000 mark after gyrating above and below that level. Private bank stocks eased. Shares of state-run oil marketing companies dropped while shares of oil exploration and production companies rose as Brent crude oil prices peaked to near \$70 a barrel mark. Telecom shares edged lower.

Corporate News: The Supreme Court ordered that status quo be maintained on Reliance Communication's sale of assets to R-Jio on pleas by a consortium of banks. The apex court bench refused to lift the stay ordered by Bombay High Court on R-Com asset sale. The top court will hear pleas from the consortium of banks and RCom against stay of assets sale by HC on April 5. The merger of DTH operators Dish TV India and Videocon d2h has been concluded and is set to create the largest DTH service provider in the country with a subscriber base of about 28 million. Hero MotoCorp would be in news after the firm has hiked stake in Colombian joint venture to 68% from the current 51%.



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|--------|-------|-------|
| FII(USD mm) | (10.8) | 110.9 | 11.5 |
| MF(INR cr) | 887.2 | 233.4 | 551.9 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|-----------|---------|---------|
| Cash(INR cr) | 30,988 | 32,268 | 33,347 |
| F&O(INR cr) | 1,365,419 | 877,548 | 664,013 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 17.9 | 17.3 | 12.2 |
| NSE VIX | 15.3 | 15.0 | 12.9 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|---------|--------|-------------|--------|---------|----------|
| Banks | 24,142 | (0.5) % | 12.0 % | Energy | 13,373 | 0.4 % | 13.1 % |
| IT | 12,490 | (0.9) % | 17.9 % | Pharma | 8,474 | (0.6) % | (19.3) % |
| Metals | 3,550 | 0.3 % | 14.3 % | Finance | 10,141 | (0.6) % | 14.9 % |
| Auto | 10,737 | (0.9) % | 8.2 % | PSU | 2,805 | (2.0) % | (20.4) % |
| FMCG | 26,036 | (0.2) % | 10.1 % | Real Estate | 303 | (1.2) % | 38.3 % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|-------|---------|------------|--------|---------|----------|
| Oil India | 341 | 2.7 % | 3.3 % | Ashok Leyl | 142 | (3.7) % | 68.8 % |
| SAIL | 74 | 2.1 % | 16.8 % | B P C L | 415 | (3.7) % | (2.6) % |
| Vedanta | 292 | 2.1 % | 7.0 % | Bharat Ele | 143 | (3.3) % | (1.3) % |
| O N G C | 179 | 1.9 % | (3.7) % | H P C L | 343 | (3.0) % | (0.8) % |
| Titan Comp | 888 | 1.8 % | 93.2 % | Rural Elec | 126 | (2.8) % | (29.7) % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--------------------------------------------------------|------------|-----------|--------|--------|----------------|
| Consumer Price Index (FEB) | 23-03-2018 | 12:30 | CAD | - | 131.7 |
| Consumer Price Index (YoY) (FEB) | 23-03-2018 | 12:30 | CAD | - | 0.017 |
| Consumer Price Index Core (YoY) (FEB) | 23-03-2018 | 12:30 | CAD | - | 0.018 |
| Consumer Price Index Core- Median (YoY) (FEB) | 23-03-2018 | 12:30 | CAD | - | 0.019 |
| Consumer Price Index Core- Trim (YoY) (FEB) | 23-03-2018 | 12:30 | CAD | - | 0.018 |
| Consumer Price Index n.s.a. (MoM) (FEB) | 23-03-2018 | 12:30 | CAD | - | 0.007 |
| Retail Sales (MoM) (JAN) | 23-03-2018 | 12:30 | CAD | - | (0.008) |
| Retail Sales Ex Auto (MoM) (JAN) | 23-03-2018 | 12:30 | CAD | - | (0.018) |
| BOE's Vlieghe speaks in Birmingham. | 23-03-2018 | 12:30 | GBP | - | - |
| BOJ Outright Bond Purchase 1~3 Years | 23-03-2018 | 1:10 | JPY | - | - |
| BOJ Outright Bond Purchase 3~5 Years | 23-03-2018 | 1:10 | JPY | - | - |
| Baker Hughes U.S. Rig Count (MAR 23) | 23-03-2018 | 17:00 | USD | - | 990 |
| Cap Goods Orders Nondef Ex Air (FEB P) | 23-03-2018 | 12:30 | USD | - | (0.003) |
| Cap Goods Ship Nondef Ex Air (FEB P) | 23-03-2018 | 12:30 | USD | - | (0.001) |
| Durable Goods Orders (FEB P) | 23-03-2018 | 12:30 | USD | - | (0.036) |
| Durables Ex Transportation (FEB P) | 23-03-2018 | 12:30 | USD | - | (0.003) |
| Fed's Bostic Speaks on the Economic Outlook | 23-03-2018 | 12:10 | USD | - | - |
| Fed's Kashkari Speaks in Moderated Q&A | 23-03-2018 | 14:30 | USD | - | - |
| Fed's Rosengren Speaks at International Research Forum | 23-03-2018 | 23:00 | USD | - | - |
| New Home Sales (FEB) | 23-03-2018 | 14:00 | USD | - | - |
| New Home Sales (MoM) (FEB) | 23-03-2018 | 14:00 | USD | - | (0.078) |

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