



25 Mar.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,457	0.0 %	12.2 %
BSE SENSEX	38,165	(0.6) %	14.5 %
CNX BANK	29,583	0.0 %	21.6 %
CNX MIDCAP	17,741	0.0 %	(7.1) %
CNX SMALLCAP	6,541	0.0 %	(17.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,502	(1.8) %	9.3 %
S&P 500	2,801	(1.9) %	11.7 %
FTSE 100	7,208	(2.0) %	7.0 %
HANG SENG	29,113	0.1 %	15.8 %
NIKKEI	21,627	0.1 %	10.6 %
SHANGHAI COMPOSITE	3,104	0.1 %	25.9 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.54	(0.3) %	(1.3) %
EUR/USD	1.14	0.2 %	(0.5) %
GBP/USD	1.31	(0.6) %	3.1 %
USD/JPY	110.66	(0.6) %	1.0 %
USD/AUD	1.40	(0.5) %	(1.3) %
USD/SGD	1.35	(0.2) %	(1.2) %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(1.6) %	26.9 %
Gold(INR/10g)	32,007	0.6 %	1.5 %
Gold Comex(USD/oz)	1,313	0.3 %	1.8 %
SILVER(INR/1Kg)	38,160	1.2 %	(0.3) %
Aluminium(USD/MT)	1,867	(1.3) %	0.5 %
Copper(USD/MT)	6,375	(2.2) %	9.2 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	(0.1) %	(0.2) %

**Global Economy:** Wholesale inventories in the US increased by much more than anticipated in the month of January, according to a report released by the Commerce Department on Friday. The report said wholesale inventories surged up by 1.2 percent in January after jumping by 1.1% in December. The US existing home sales rose by 11.8% to an annual rate of 5.51 million in February after slumping by 1.4% to a revised rate of 4.93 million in January. Eurozone private sector expanded at the slowest pace in two months in March, amid a deepening downturn in manufacturing, defying expectations for a modest improvement, suggesting that the growth momentum is set to remain sluggish in the 19-nation economy. The flash Eurozone Composite Purchasing Managers' Index rose to a two-month low of 51.3 from 51.9 in February, flash data from the IHS Markit survey showed on Friday. A score above 50 suggest growth in the sector, while a reading lower than 50 indicates contraction.

**Global Equities:** US stocks tumbled on Friday following economic growth concerns. The Nasdaq and the S&P 500 pulled back well off Thursday's five-month closing highs.

**Indian Economy:** India's foreign exchange reserves surged by US\$ 3.60 billion to US\$ 405.64 billion in the week ended 15 March 2019. The foreign exchange reserves had stood at US\$ 402.04 a week ago. Within the foreign exchange reserves, the foreign currency assets rose to US\$ 377.77 billion in the week ended 15 March 2019 from US\$ 374.23 billion a week ago. The gold asset also moved up marginally to US\$ 23.41 billion from US\$ 23.37 billion a week ago. SDRs were flat at US\$ 1.46 billion in the week ended 15 March 2019. India's foreign exchange reserves have dipped by US\$ 18.91 billion over March 2018 and US\$ 15.70 billion over a year ago level, mainly driven by the decline in foreign currency assets.

**Equity Markets:** The Sensex snapped an eight-day rising streak on Friday amid profit booking by investors. The Nifty ended below the 11,500 mark after moving above and below that mark in intraday trade. The Sensex fell 222.14 points or 0.58% to settle at 38,164.61. The index rose 177.96 points, or 0.46% at the day's high of 38,564.71. The index fell 297.39 points, or 0.77% at the day's low of 38,089.36.

**Corporate News:** TTK Prestige announced that its board will meet on 29 March 2019 to recommend issue of bonus shares, subject to the approval of shareholders. Max India announced that its board appointed Analjit Singh as a non-executive director and chairman on the board with effect from 1 April 2019. Rahul Khosla, chairman and non-executive director of the company, will step down from the board of directors of the company effective closure of business hours on 31 March 2019. Dr Reddy's Laboratories announced that the audit of research and development facility of Aurigene Discovery Technologies, a wholly owned subsidiary, situated at Miyapur, Hyderabad by the US Food and Drug Administration (USFDA), completed on 21 March 2019. No FDA 483 was issued at the end of inspection. State Bank of India (SBI) announced that its board approved extension of validity period for raising equity capital of upto Rs 20,000 crore from market by way of FPO/QIP/preferential allotment/rights issue/any other mode or a combination of these till 31 March 2020.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	196.2	293.5	(3.5)
MF(INR cr)	(712.5)	(576.1)	353.5

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	40,011	40,473	34,710
F&O(INR cr)	895,226	1,092,960	973,963

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.5	14.4	16.5
NSE VIX	16.3	15.7	15.3

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,583	(0.8) %	21.6 %	Energy	16,152	(1.5) %	21.5 %
IT	15,551	(0.3) %	22.4 %	Pharma	9,199	(0.7) %	6.7 %
Metals	2,983	(0.4) %	(15.7) %	Finance	12,262	(0.7) %	19.5 %
Auto	8,337	(1.3) %	(24.6) %	PSU	3,124	(2.1) %	9.5 %
FMCG	30,199	(0.3) %	14.0 %	Real Estate	267	0.6 %	(9.9) %

### NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
NTPC	135	4.2 %	(5.2) %	Motherson	147	(6.4) %	(31.8) %
ICICI Lomb	1,000	2.1 %	27.6 %	NMDC	107	(5.9) %	(9.2) %
Larsen & T	1,395	1.7 %	4.4 %	Bank of Ba	120	(4.1) %	(15.4) %
P & G Hygi	10,465	1.6 %	11.4 %	ICICI Pru	329	(4.0) %	(14.4) %
ACC	1,583	1.5 %	3.0 %	Sun TV Net	596	(3.3) %	(30.7) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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