



26 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,389	0.3 %	11.5 %
BSE SENSEX	37,809	(0.9) %	14.2 %
CNX BANK	29,455	0.6 %	21.1 %
CNX MIDCAP	17,745	0.8 %	(7.1) %
CNX SMALLCAP	6,493	0.9 %	(18.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,517	0.1 %	9.4 %
S&P 500	2,798	(0.1) %	11.6 %
FTSE 100	7,178	(0.4) %	6.6 %
HANG SENG	28,523	(2.0) %	13.5 %
NIKKEI	21,428	2.2 %	9.5 %
SHANGHAI COMPOSITE	3,043	(2.0) %	23.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.98	0.6 %	(0.7) %
EUR/USD	1.13	(0.7) %	(1.2) %
GBP/USD	1.32	0.4 %	3.5 %
USD/JPY	110.01	(0.6) %	0.4 %
USD/AUD	1.41	0.5 %	(0.8) %
USD/SGD	1.35	0.2 %	(1.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(0.4) %	26.4 %
Gold(INR/10g)	32,054	0.1 %	1.7 %
Gold Comex(USD/oz)	1,321	0.6 %	2.3 %
SILVER(INR/1Kg)	38,172	0.0 %	(0.2) %
Aluminium(USD/MT)	1,856	(0.6) %	(0.1) %
Copper(USD/MT)	6,328	(0.7) %	8.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	(0.0) %	(0.2) %

Global Economy: Germany's consumer confidence is set to slightly weaken in April, driven by some easing in households' income expectations and the propensity to buy, survey results from the GfK showed on Tuesday. The forward-looking consumer confidence index fell to 10.4 from a revised 10.7 in March. Germany's business confidence strengthened in March, after weakening in the previous six months, as businesses were more optimistic regarding the future and the economy's resilience, results of a key survey showed. The Ifo business confidence index rose to 99.6 from a revised 98.7 in February, data from the Munich-based Ifo Institute revealed.

Global Equities: US stocks showed a lack of direction over the course of the trading day on Monday.

Indian Economy: FinTech has the potential to reshape the financial services and financial inclusion landscape in India in fundamental ways, noted the RBI governor Shaktikanta Das in a speech. It can reduce costs and improve access and quality of financial services. FinTech stands for financial technology and describes technologically enabled financial innovations. From 'start-ups' to 'big-techs' to established financial institutions, all the key players are harnessing this technological edge along the financial services' value chain to provide agile, efficient and differentiated experiences to the end-user, he stated further.

Equity Markets: Key benchmark indices ended with sharp losses amid weak global stocks. Concerns about the health of the world economy spooked investors. The uncertainty around Brexit (the withdrawal of the United Kingdom from the European Union) also kept markets nervous.

Corporate News: Jet Airways announced after market hours yesterday that its board approved conversion of Rs 1 of lenders' debt into equity by the issuance of 11.40 crore equity shares, in accordance with the RBI Circular of 12th February 2018. With this, the consortium of Indian lenders, led by State Bank of India (SBI), will become the majority shareholders of Jet Airways. Grasim Industries said it has challenged the order of Deputy Commissioner of Income Tax (DCIT) dated 14 March 2019, raising demand of sum of Rs 5872.13 crore on account of dividend distribution tax (including interest) before the Bombay High Court. The company has submitted that the order passed by the DCIT is wholly unsustainable in law and the department has sought time to file reply. Newgen Software Technologies announced that its board approved to incorporate a wholly-owned subsidiary in Australia and to make initial investment upto 1.5 million Australian dollars in the proposed subsidiary by way of subscribing to its shares.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	209.2	287.5	(2.6)
MF(INR cr)	(818.8)	(594.8)	348.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,004	39,975	34,703
F&O(INR cr)	826,876	1,075,221	973,358

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.3	14.5	16.5
NSE VIX	16.7	15.8	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,281	(1.0) %	20.4 %	Energy	16,148	(0.0) %	21.5 %
IT	15,417	(0.9) %	21.3 %	Pharma	9,170	(0.3) %	6.4 %
Metals	2,950	(1.1) %	(16.7) %	Finance	12,136	(1.0) %	18.3 %
Auto	8,239	(1.2) %	(25.5) %	PSU	3,083	(1.3) %	8.0 %
FMCG	29,921	(0.9) %	12.9 %	Real Estate	262	(1.9) %	(11.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
I O C L	164	4.6 %	(3.6) %	Vodafone I	30	(6.1) %	(61.1) %
O N G C	159	4.1 %	(11.8) %	Zee Entert	416	(4.2) %	(28.1) %
Oil India	176	2.4 %	(22.4) %	S A I L	50	(3.6) %	(31.6) %
B H E L	69	2.3 %	(16.2) %	DLF	189	(3.5) %	(5.8) %
Coal India	237	2.3 %	(14.5) %	Vedanta	168	(3.2) %	(40.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA's Kent takes part in Sydney panel	26-03-2019	23:00	AUD	-	-
German GfK Consumer Confidence (APR)	26-03-2019	07:00	EUR	-	10.8
French Gross Domestic Product (QoQ) (4Q F)	26-03-2019	07:45	EUR	-	0.003
French Gross Domestic Product (YoY) (4Q F)	26-03-2019	07:45	EUR	-	0.009
BBA Loans for House Purchase (FEB)	26-03-2019	09:30	GBP	-	40634
BOE's Broadbent Speak on Statistics in London	26-03-2019	11:00	GBP	-	-
Fed's Rosengren Speaks at Finance Conference in Hong Kong	26-03-2019	00:30	USD	-	-
Fed's Harker Speaks in Frankfurt on Economic Outlook	26-03-2019	07:45	USD	-	-
Fed's Evans Takes Part in a Moderated Q&A in Hong Kong	26-03-2019	10:30	USD	-	-
Building Permits (FEB)	26-03-2019	12:30	USD	-	-
Building Permits (MoM) (FEB)	26-03-2019	12:30	USD	-	0.014
Housing Starts (FEB)	26-03-2019	12:30	USD	-	-
Housing Starts (MoM) (FEB)	26-03-2019	12:30	USD	-	0.186
House Price Index (MoM) (JAN)	26-03-2019	13:00	USD	-	0.003
S&P CoreLogic CS 20-City (MoM) SA (JAN)	26-03-2019	13:00	USD	-	0.0019
S&P/Case-Shiller 20-City Index n.s.a (JAN)	26-03-2019	13:00	USD	-	212.96
S&P/Case-Shiller Composite-20 (YoY) (JAN)	26-03-2019	13:00	USD	-	0.0418
S&P/Case-Shiller US Home Price Index (JAN)	26-03-2019	13:00	USD	-	205.35
S&P/Case-Shiller US Home Price Index (YoY) (JAN)	26-03-2019	13:00	USD	-	0.0472
Conf. Board Expectations (MAR)	26-03-2019	14:00	USD	-	103.4
Conf. Board Present Situation (MAR)	26-03-2019	14:00	USD	-	173.5
Consumer Confidence Index (MAR)	26-03-2019	14:00	USD	-	131.4
Richmond Fed Manufact. Index (MAR)	26-03-2019	14:00	USD	-	16
U.S. to Sell USD26 Bln 52-Week Bills	26-03-2019	15:30	USD	-	-
U.S. to Sell USD40 Bln 2-Year Notes	26-03-2019	17:00	USD	-	-
Fed's Daly to Discuss Managing Inflation in Current Climate	26-03-2019	19:00	USD	-	-

..... End of Report