



27 Feb.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,881	0.4 %	6.6 %
BSE SENSEX	35,974	(0.7) %	8.9 %
CNX BANK	27,078	0.5 %	11.3 %
CNX MIDCAP	16,667	0.5 %	(12.7) %
CNX SMALLCAP	5,902	0.4 %	(25.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,058	(0.1) %	11.7 %
S&P 500	2,794	(0.1) %	11.5 %
FTSE 100	7,151	(0.5) %	6.2 %
HANG SENG	28,772	(0.7) %	14.5 %
NIKKEI	21,449	(0.4) %	9.6 %
SHANGHAI COMPOSITE	2,942	(0.7) %	19.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.07	(0.1) %	2.4 %
EUR/USD	1.14	0.4 %	(0.6) %
GBP/USD	1.32	1.5 %	4.0 %
USD/JPY	110.60	(0.1) %	0.9 %
USD/AUD	1.39	(0.8) %	(2.1) %
USD/SGD	1.35	(0.2) %	(1.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(14.3) %	19.3 %
Gold(INR/10g)	33,264	(0.2) %	5.5 %
Gold Comex(USD/oz)	1,325	(0.1) %	2.7 %
SILVER(INR/1Kg)	40,092	(0.6) %	4.8 %
Aluminium(USD/MT)	1,870	(0.8) %	0.6 %
Copper(USD/MT)	6,471	(1.1) %	10.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	(0.0) %	0.0 %

Global Economy: The US Fed Chair Jerome Powell delivered his testimony to a US Senate committee and noted that the US economic outlook was generally favorable but warned about headwinds from overseas. Consumer confidence in the US recovered in February following three consecutive monthly decreases, according to a report released by the Conference Board on Tuesday. The Conference Board said its consumer confidence index jumped to 131.4 in February. The US housing starts plummeted by 11.2% to an annual rate of 1.078 million in December. With the much bigger than expected decrease, housing starts plummeted to their lowest annual rate since hitting 1.064 million in September of 2016. Germany's forward-looking consumer confidence indicator showed a reading of 10.8 for March, same as in February, the Nuremberg-based market research group said. Consumer confidence is set to hold steady in March, amid the sustained sharp decline in economic expectations and stable income expectations, survey data from the GfK revealed Tuesday.

Global Equities: DOW was little changed. Sentiments are steady in Asia today as US President Donald Trump and North Korean leader Kim Jong Un are set to meet in Vietnam.

Indian Economy: The government extended the deadline to impose retaliatory customs duties on 29 US products, including almond, walnut and pulses, till April 1. India's fiscal deficit stood at Rs 7.71 lakh crore in April-January FY2019 period, which is 121.5% of the overall budget deficit estimate for FY2019. The Government of India has received Rs 1230737 crore (67.52% of corresponding RE 18-19 of Total Receipts) upto January 2019 comprising Rs 1019288 crore Tax Revenue (Net to Centre), Rs 162126 crore of Non Tax Revenue and Rs 49323 crore of Non Debt Capital Receipts. Non Debt Capital Receipts consists of Recovery of Loans (Rs 13717 crore) and Disinvestment of PSUs (Rs 35606 crore).

Equity Markets: The market ended the volatile session with modest losses amid rising geo-political concerns. India carried out non-military, pre-emptive air strikes across the Line of Control (LoC) early this morning to target the terror group Jaish-e-Mohammed (JeM). The Sensex settled below the psychological 36,000 level after moving above and below that level in intraday trade.

Corporate News: Max India announced after market hours yesterday that its board approved selling its 51% stake in Max Bupa Health Insurance Company (Max Bupa), to private equity firm, True North. The all cash transaction values Max Bupa at an enterprise value of Rs 1,001 crore and is subject to requisite regulatory approvals. Allahabad Bank, Corporation Bank and Dhanlaxmi Bank will be watched. After reviewing the performance of banks under Prompt Corrective Action (PCA) framework, the Reserve Bank of India (RBI) decided to remove Allahabad Bank, Corporation Bank and Dhanlaxmi Bank out of the PCA Framework, subject to certain conditions and continuous monitoring. Reliance Industries will be watched. With reference to news item, "RIL, TCG front-runners to take over iconic Garden Vareli brand," RIL clarified after market hours yesterday, 26 February 2019, that it is unable to comment on media speculation and rumors and it would be inappropriate on its part to do so. The company evaluates various opportunities on an ongoing basis.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	253.6	109.2	(22.2)
MF(INR cr)	(2,079.9)	497.1	435.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,208	34,211	34,289
F&O(INR cr)	1,190,981	876,559	961,148

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.2	15.3	16.7
NSE VIX	17.1	16.2	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,953	(0.8) %	10.8 %	Energy	14,696	(0.5) %	10.6 %
IT	15,990	(0.1) %	25.8 %	Pharma	8,829	0.2 %	2.4 %
Metals	2,855	0.1 %	(19.3) %	Finance	11,295	(1.0) %	10.1 %
Auto	8,399	0.3 %	(24.0) %	PSU	2,730	(1.5) %	(4.4) %
FMCG	29,254	(0.3) %	10.4 %	Real Estate	228	(1.6) %	(23.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	469	5.4 %	(19.0) %	Indiabulls	659	(2.9) %	(47.0) %
Tata Motor	183	3.9 %	(46.1) %	Vodafone I	30	(2.3) %	(61.7) %
Sun TV Net	605	3.1 %	(29.6) %	General In	216	(2.2) %	(41.5) %
Shriram Tr	1,130	2.8 %	(23.1) %	HCL Techno	1,059	(2.2) %	8.1 %
Coal India	220	2.7 %	(20.7) %	H D F C	1,854	(2.2) %	0.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Construction Work Done (4Q)	27-02-2019	0:30	AUD	-	(0.028)
Consumer Price Index (JAN)	27-02-2019	13:30	CAD	-	133.4
Consumer Price Index (YoY) (JAN)	27-02-2019	13:30	CAD	-	0.02
Consumer Price Index Core (YoY) (JAN)	27-02-2019	13:30	CAD	-	0.019
Consumer Price Index n.s.a. (MoM) (JAN)	27-02-2019	13:30	CAD	-	(0.001)
CPI Core- Median (YoY) (JAN)	27-02-2019	13:30	CAD	-	0.018
CPI Core- Trim (YoY) (JAN)	27-02-2019	13:30	CAD	-	0.019
Credit Suisse Survey Expectations (FEB)	27-02-2019	9:00	CHF	-	(44)
Euro-Zone Business Climate Indicator (FEB)	27-02-2019	10:00	EUR	-	0.69
Euro-Zone Consumer Confidence (FEB F)	27-02-2019	10:00	EUR	-	(7.4)
Euro-Zone Economic Confidence (FEB)	27-02-2019	10:00	EUR	-	106.2
Euro-Zone Industrial Confidence (FEB)	27-02-2019	10:00	EUR	-	0.5
Euro-Zone Services Confidence (FEB)	27-02-2019	10:00	EUR	-	11
Euro-Zone M3 Money Supply (YoY) (JAN)	27-02-2019	9:00	EUR	-	0.041
BRC Shop Price Index (YoY) (FEB)	27-02-2019	0:01	GBP	-	0.004
BOJ Outright Bond Purchase 1~3 Years	27-02-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	27-02-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	27-02-2019	1:10	JPY	-	-
BOJ Kataoka makes a speech in Takamatsu	27-02-2019	1:30	JPY	-	-
Foreign Buying Japan Bonds (FEB 22)	27-02-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (FEB 22)	27-02-2019	23:50	JPY	-	-
Industrial Production (MoM) (JAN P)	27-02-2019	23:50	JPY	-	(0.001)
Industrial Production (YoY) (JAN P)	27-02-2019	23:50	JPY	-	(0.019)
Japan Buying Foreign Bonds (Yen) (FEB 22)	27-02-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (FEB 22)	27-02-2019	23:50	JPY	-	-
Large Retailers' Sales (JAN)	27-02-2019	23:50	JPY	-	(0.01)
Retail Trade (YoY) (JAN)	27-02-2019	23:50	JPY	-	0.013
Retail Trade s.a. (MoM) (JAN P)	27-02-2019	23:50	JPY	-	0.009
NBA Eastern Conference Finals (FEB 22)	27-02-2019	12:00	USD	-	0.026



Advance Goods Trade Balance (DEC)	27-02-2019	13:30	USD	-	-
Retail Inventories (MoM) (DEC)	27-02-2019	13:30	USD	-	-
Wholesale Inventories (MoM) (DEC F)	27-02-2019	13:30	USD	-	-
Cap Goods Orders Nondef Ex Air (DEC F)	27-02-2019	15:00	USD	-	(0.007)
Cap Goods Ship Nondef Ex Air (DEC F)	27-02-2019	15:00	USD	-	0.005
Durable Goods Orders (DEC F)	27-02-2019	15:00	USD	-	0.012
Durables Ex Transportation (DEC F)	27-02-2019	15:00	USD	-	0.001
Factory Orders (DEC)	27-02-2019	15:00	USD	-	(0.006)
Factory Orders Ex Trans (DEC)	27-02-2019	15:00	USD	-	(0.013)
Pending Home Sales (MoM) (JAN)	27-02-2019	15:00	USD	-	(0.022)
Pending Home Sales (YoY) (JAN)	27-02-2019	15:00	USD	-	(0.095)
Powell to deliver Semi-Annual Testimony to House Panel	27-02-2019	15:00	USD	-	-
DOE Cushing OK Crude Inventory (FEB 22)	27-02-2019	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (FEB 22)	27-02-2019	15:30	USD	-	-
DOE U.S. Distillate Inventory (FEB 22)	27-02-2019	15:30	USD	-	-
DOE U.S. Gasoline Inventories (FEB 22)	27-02-2019	15:30	USD	-	-

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