



27 Mar.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,188	0.6 %	10.3 %
BSE SENSEX	33,066	1.4 %	10.9 %
CNX BANK	24,396	0.6 %	13.2 %
CNX MIDCAP	18,823	0.6 %	8.6 %
CNX SMALLCAP	7,806	0.9 %	10.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,203	2.8 %	(2.5) %
S&P 500	2,659	2.7 %	(1.4) %
FTSE 100	6,889	(0.5) %	(9.9) %
HANG SENG	30,549	0.8 %	0.1 %
NIKKEI	20,766	0.7 %	(11.7) %
SHANGHAI COMPOSITE	3,134	(0.6) %	(6.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.87	(0.4) %	1.9 %
EUR/USD	1.24	0.9 %	3.6 %
GBP/USD	1.42	0.7 %	5.3 %
USD/JPY	105.71	0.8 %	(6.2) %
USD/AUD	1.29	(0.3) %	1.1 %
USD/SGD	1.31	(0.5) %	(2.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	2.5 %	9.1 %
Gold(INR/10g)	30,756	0.2 %	4.8 %
Gold Comex(USD/oz)	1,353	0.7 %	3.4 %
SILVER(INR/1Kg)	38,431	0.6 %	(0.4) %
Aluminium(USD/MT)	2,049	(0.5) %	(9.2) %
Copper(USD/MT)	6,658	(1.3) %	(7.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.4 %

Global Economy: The euro area is set to continue its expansion on global economic activity growth and export demand, according to Eurozone Economic Outlook jointly published by Ifo Institute, Italy's statistical office Istat and the KOF Swiss Economic Institute. Gross domestic product is estimated to rise 0.6% each in the first and second quarters of 2018. However, it is expected to slow slightly to 0.5% in the third quarter. The main force behind the expansion in economic activity will be investment, driven by favorable financing conditions and still upward trending capacity utilization, institutes said. Private consumption expenditures are also expected to grow robustly still supported by the improvements in the labor market.

Global Equities: European stocks edged higher and Asian stocks ended mixed on hopes that talks between the US and China could prevent any escalation of the trade dispute between the two countries.

Indian Economy: If the tariff war escalates into a full-scale global trade war, it would have a collateral damage for the Indian economy as well, with the country's exports taking a hit, current account deficit facing pressure and the GDP taking a setback, the ASSOCHAM has said. Instead of de-escalating, the trade tensions between the US and China with the fall out impact on other trading majors, have only escalated; spooking the global financial markets. The tensions in the market look quite justified, as the Trump move to levy tariff on trading partners could lead to a further retaliation against the US. Though India may not get much of a direct impact, the collateral damage could be in the form of adverse impact on the overall sentiment, the chamber said

Equity Markets: Local stocks jumped in last session as gains in European stocks and recovery in Asian shares boosted investors' sentiment. The Sensex settled above the 33,000 mark and the Nifty ended above the psychological 10,000 level. Banking and metal & mining stocks advanced. Index heavyweights HDFC Bank, HDFC and Reliance Industries advanced. Key indices opened the session with a bit of initial volatility. Indices languished around the flat line till afternoon trade. Key indices extended gains in afternoon trade and settled with strong gains as global cues turned positive.

Corporate News: Wipro announced an expanded global relationship with Adobe to create, build and run digital marketing solutions and campaigns for their clients, across the globe. As part of this alliance, Wipro will embed Adobe's design and prototyping software, Adobe XD CC, the all-in-one UX/UI solution for designing and prototyping mobile apps and websites, into its Digital Experience Platforms. Adani Enterprises said it has signed a coal mining agreement with NLC India Ltd for development and operation of Talabira II and III coal block. Infrastructure company KEC International has won new orders worth Rs 2,419 crore across its businesses.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	403.9	122.9	13.1
MF(INR cr)	430.9	240.9	557.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,029	32,817	33,377
F&O(INR cr)	932,470	875,317	665,608

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	24.9	18.2	12.3
NSE VIX	15.2	15.1	12.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,244	2.4 %	12.5 %	Energy	13,280	0.3 %	12.4 %
IT	12,462	(0.6) %	17.7 %	Pharma	8,391	0.8 %	(20.1) %
Metals	3,521	2.1 %	13.4 %	Finance	10,207	2.3 %	15.7 %
Auto	10,801	1.5 %	8.9 %	PSU	2,850	4.9 %	(19.2) %
FMCG	26,169	1.0 %	10.7 %	Real Estate	296	1.2 %	35.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bank of Ba	142	6.2 %	(17.9) %	Wipro	274	(3.7) %	8.1 %
Yes Bank	303	5.8 %	(1.4) %	GAIL (Indi)	425	(3.3) %	10.5 %
St Bk of I	247	5.0 %	(15.9) %	Petronet L	226	(2.6) %	9.1 %
Titan Comp	939	4.9 %	104.4 %	Oil India	342	(2.1) %	3.7 %
Avenue Sup	1,341	4.7 %	111.5 %	H P C L	333	(1.7) %	(3.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Euro-Zone Business Climate Indicator (MAR)	27-03-2018	09:00	EUR	-	-
Euro-Zone Consumer Confidence (MAR F)	27-03-2018	09:00	EUR	-	-
Euro-Zone Economic Confidence (MAR)	27-03-2018	09:00	EUR	-	-
Euro-Zone Industrial Confidence (MAR)	27-03-2018	09:00	EUR	-	-
Euro-Zone M3 Money Supply (YoY) (FEB)	27-03-2018	08:00	EUR	-	-
Euro-Zone Services Confidence (MAR)	27-03-2018	09:00	EUR	-	-
German Import Price Index (MoM) (FEB)	27-03-2018	06:00	EUR	-	-
German Import Price Index (YoY) (FEB)	27-03-2018	06:00	EUR	-	-
Conf. Board Expectations (MAR)	27-03-2018	14:00	USD	-	-
Conf. Board Present Situation (MAR)	27-03-2018	14:00	USD	-	-
Consumer Confidence Index (MAR)	27-03-2018	14:00	USD	-	-
Fed's Bostic Speaks at Economic Conference in Atlanta	27-03-2018	15:00	USD	-	-
Richmond Fed Manufact. Index (MAR)	27-03-2018	14:00	USD	-	-
S&P CoreLogic CS 20-City (MoM) SA (JAN)	27-03-2018	13:00	USD	-	-
S&P/Case-Shiller 20-City Index n.s.a (JAN)	27-03-2018	13:00	USD	-	-
S&P/Case-Shiller Composite-20 (YoY) (JAN)	27-03-2018	13:00	USD	-	-
S&P/Case-Shiller US Home Price Index (JAN)	27-03-2018	13:00	USD	-	-
S&P/Case-Shiller US Home Price Index (YoY) (JAN)	27-03-2018	13:00	USD	-	-
U.S. to Sell 4-Week Bills	27-03-2018	15:30	USD	-	-
U.S. to Sell USD24 Bln 52-Week Bills	27-03-2018	15:30	USD	-	-
U.S. to Sell USD35 Bln 5-Year Notes	27-03-2018	17:00	USD	-	-

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