



27 Mar.2019

INDEX PERFORMANCE

<i>INDIAN INDICES</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
CNX NIFTY	11,534	0.4 %	12.9 %
BSE SENSEX	38,233	1.1 %	15.6 %
CNX BANK	30,161	0.9 %	24.0 %
CNX MIDCAP	17,940	0.8 %	(6.1) %
CNX SMALLCAP	6,578	1.0 %	(17.0) %
<i>GLOBAL INDICES</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
DOW JONES	25,658	0.6 %	10.0 %
S&P 500	2,818	0.7 %	12.4 %
FTSE 100	7,196	0.3 %	6.9 %
HANG SENG	28,567	0.2 %	13.7 %
NIKKEI	21,428	2.2 %	9.5 %
SHANGHAI COMPOSITE	2,997	(1.5) %	21.6 %

FOREX RATES

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
USD/INR	68.98	0.0 %	(0.7) %
EUR/USD	1.13	(0.1) %	(1.3) %
GBP/USD	1.32	0.1 %	3.6 %
USD/JPY	110.36	0.3 %	0.7 %
USD/AUD	1.40	(0.5) %	(1.3) %
USD/SGD	1.35	0.0 %	(1.0) %

COMMODITIES

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
WTI Crude(USD/bbl)	60	2.1 %	29.0 %
Gold(INR/10g)	31,987	(0.2) %	1.4 %
Gold Comex(USD/oz)	1,317	(0.3) %	2.0 %
SILVER(INR/1Kg)	38,067	(0.3) %	(0.5) %
Aluminium(USD/MT)	1,856	(0.6) %	(0.1) %
Copper(USD/MT)	6,328	(0.7) %	8.4 %

FIXED INCOME

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

Global Economy: US consumer confidence index dropped to 124.1 in March after jumping to 131.4 in February, the Conference Board reported, reflecting a deterioration in consumers' assessment of current conditions. New residential construction pulled back sharply in February. The Commerce Department said housing starts plunged by 8.7 percent to an annual rate of 1.162 million in February after surging up by 11.7 percent to a revised rate of 1.273 million in January.

Global Equities: US stocks gave back ground over the course of the trading day on Tuesday. The major averages pulled back well off their highs of the session but managed to hold on to gains. European markets ended higher on Tuesday, as easing fears about U.S. recession after bond yields recovered from 15-month lows, a rebound in crude oil prices and fresh optimism about upcoming U.S.-China trade negotiations outweighed concerns about Brexit.

Indian Economy: India's energy demand outpaced global demand growth in 2018 according to the International Energy Agency (IEA). The higher energy demand was driven by a global economy that expanded by 3.7% in 2018, a higher pace than the average annual growth of 3.5% seen since 2010. China, US, and India together accounted for around 70% of the rise in energy demand.

Equity Markets: Local shares rose sharply on Tuesday, tracking firm cues from global markets and a firmer rupee as U.S. 10-year Treasury yields recovered slightly from 2017 lows hit in the previous session, helping ease fears over a possible U.S. recession. Rising oil prices may also keep underlying sentiment cautious ahead of the near-month derivative expiry due on Thursday.

Corporate News: Dr. Reddy's Laboratories announced appointment of Allan Grant Oberman as an additional director, categorized as independent, on the board of the company for a period of five years, effective 26 March 2019. The National Company Law Appellate Tribunal (NCLAT) stayed the two notices issued by the Department of Telecom (DoT) to debt-ridden Reliance Communications for cancellation of its spectrum licence for delay in payment. After Jet Airways (India) chairman Naresh Goyal stepped down, the company's board approved the conversion of Re 1 of lenders' debt into equity by the issuance of 11.40 crore equity shares, in accordance with the RBI Circular of 12 February 2018. With this, the consortium of Indian lenders, led by State Bank of India (SBI), will become the majority shareholders of Jet Airways.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(95.7)	262.0	(3.0)
MF(INR cr)	712.5	(521.9)	345.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,671	39,706	34,707
F&O(INR cr)	1,171,155	1,081,217	974,168

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.7	14.5	16.5
NSE VIX	16.5	15.8	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,882	2.1 %	22.8 %	Energy	16,541	2.4 %	24.5 %
IT	15,357	(0.4) %	20.9 %	Pharma	9,245	0.8 %	7.2 %
Metals	2,981	1.0 %	(15.8) %	Finance	12,323	1.5 %	20.1 %
Auto	8,287	0.6 %	(25.1) %	PSU	3,179	3.1 %	11.4 %
FMCG	29,958	0.1 %	13.0 %	Real Estate	264	0.9 %	(10.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
NTPC	141	4.0 %	(0.8) %	Tech Mahin	771	(2.4) %	20.4 %
Pidilite I	1,227	4.0 %	30.3 %	Vodafone I	30	(2.1) %	(62.0) %
DLF	197	3.9 %	(2.2) %	I O C L	162	(1.6) %	(5.1) %
Reliance I	1,367	3.2 %	53.1 %	Ashok Leyl	86	(1.4) %	(41.7) %
St Bk of I	304	3.2 %	23.3 %	UPL	903	(1.0) %	20.1 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
International Merchandise Trade (Canadian dollar) (JAN)	27-03-2019	12:30	CAD	-	-
Credit Suisse Survey Expectations (MAR)	27-03-2019	09:00	CHF	-	(16.6)
KOF Institute Spring Economic Forecast	27-03-2019	09:00	CHF	-	-
Industrial Profits (YoY) (FEB)	27-03-2019	01:30	CNY	-	(0.019)
ECB President Mario Draghi Speaks in Frankfurt	27-03-2019	08:00	EUR	-	-
ECB's Nowotny, Lautenschlaeger at Central Bank Conference	27-03-2019	08:00	EUR	-	-
ECB Chief Economist Praet Speaks in Frankfurt	27-03-2019	08:45	EUR	-	-
ECB's Lautenschlaeger Participates in Panel in Vienna	27-03-2019	10:00	EUR	-	-
ECB Vice President de Guindos Speaks in Frankfurt	27-03-2019	10:45	EUR	-	-
ECB Executive Board member Mersch Speaks in Frankfurt	27-03-2019	13:30	EUR	-	-
CBI Reported Sales (MAR)	27-03-2019	11:00	GBP	-	0
CBI Total Dist. Reported Sales (MAR)	27-03-2019	11:00	GBP	-	14
Foreign Buying Japan Bonds (MAR 22)	27-03-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAR 22)	27-03-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAR 22)	27-03-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAR 22)	27-03-2019	23:50	JPY	-	-
RBNZ Official Cash Rate (MAR 27)	27-03-2019	01:00	NZD	-	0.0175
MBA Mortgage Applications (MAR 22)	27-03-2019	11:00	USD	-	0.016
Trade Balance (JAN)	27-03-2019	12:30	USD	-	-
Current Account Balance (4Q)	27-03-2019	14:00	USD	-	-
DOE Cushing OK Crude Inventory (MAR 22)	27-03-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAR 22)	27-03-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (MAR 22)	27-03-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (MAR 22)	27-03-2019	14:30	USD	-	-
U.S. to Sell USD18 Bln 2-Year Floating Rate Notes Reopening	27-03-2019	15:30	USD	-	-
Revisions: Industrial Production and Capacity Utilization	27-03-2019	16:00	USD	-	-
U.S. to Sell USD41 Bln 5-Year Notes	27-03-2019	17:00	USD	-	-
Fed's George Speaks to Money Marketeers of New York	27-03-2019	21:30	USD	-	-



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