



28 Mar.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,492	0.4 %	12.5 %
BSE SENSEX	38,133	(0.3) %	15.1 %
CNX BANK	30,093	0.2 %	23.7 %
CNX MIDCAP	18,009	0.6 %	(5.7) %
CNX SMALLCAP	6,637	0.7 %	(16.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,626	(0.1) %	9.9 %
S&P 500	2,805	(0.5) %	11.9 %
FTSE 100	7,194	(0.0) %	6.8 %
HANG SENG	28,728	0.6 %	14.3 %
NIKKEI	21,379	(0.2) %	9.3 %
SHANGHAI COMPOSITE	3,023	0.9 %	22.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.04	0.1 %	(0.6) %
EUR/USD	1.13	(0.3) %	(1.7) %
GBP/USD	1.32	(0.0) %	3.6 %
USD/JPY	110.49	0.1 %	0.8 %
USD/AUD	1.41	0.5 %	(0.8) %
USD/SGD	1.35	0.3 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(0.9) %	27.7 %
Gold(INR/10g)	32,067	0.3 %	1.7 %
Gold Comex(USD/oz)	1,309	(0.6) %	1.4 %
SILVER(INR/1Kg)	38,032	(0.1) %	(0.6) %
Aluminium(USD/MT)	1,899	2.6 %	2.2 %
Copper(USD/MT)	6,339	(0.4) %	8.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	(0.1) %	(0.3) %

Global Economy: US trade deficit narrowed to \$51.1 billion in January from a revised \$59.9 billion in December, largely reflecting a steep drop in the value of imports, the Commerce Department reported on Wednesday. In the previous month, the trade deficit increased to its highest level since reaching \$60.2 billion in October of 2008. The narrower than expected deficit came as the value of imports tumbled by 2.6 percent to \$258.5 billion in January after jumping by 2.1 percent to \$265.3 billion in December.

Global Equities: US stocks fluctuated over the course of the trading session on Wednesday before ending the day mostly lower. The choppy trading on the day partly reflected the volatility shown by the markets over the past several sessions. The major averages eventually closed in negative territory but well off their worst levels of the day.

Indian Economy: Prime Minister Narendra Modi on Wednesday, 27 March 2019, announced successful launch of the country's Anti-Satellite Missile System (A-SAT). Defence Research and Development Organisation (DRDO) successfully conducted an A-SAT missile test 'Mission Shakti' from the Dr AP J Abdul Kalam Island in Odisha. A DRDO-developed Ballistic Missile Defence (BMD) Interceptor Missile successfully engaged an Indian orbiting target satellite in Low Earth Orbit (LEO) in a 'Hit to Kill' mode. The interceptor missile was a three-stage missile with two solid rocket boosters. Tracking data from range sensors has confirmed that the mission met all its objectives.

Equity Markets: Key equity benchmarks ended with modest losses after a volatile session. Investors booked profits amid mixed cues from other Asian shares and negative cues from European market. The Nifty retracted after crossing 10,500 mark in morning trade.

Corporate News: Strides Pharma Science rose 3.40% after the company announced that it has received US Food and Drug Administration approval for its greenfield oral dosage facility in Singapore. Lupin said that it received approval for its Tadalafil Tablets USP, 2.5 mg, 5 mg, 10 mg, and 20 mg, from the United States Food and Drug Administration (FDA) to market a generic version of Eli Lilly and Company's Cialis Tablets, 2.5 mg, 5 mg, 10 mg, and 20 mg. S&P has cut its rating on senior unsecured notes of JLR and Tata Motors, citing JLR's weaker than expected Q3 results.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	129.2	253.7	(2.4)
MF(INR cr)	1,797.7	(377.2)	351.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	42,195	39,852	34,737
F&O(INR cr)	1,720,337	1,118,812	977,214

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.2	14.6	16.5
NSE VIX	17.1	15.9	15.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,020	0.5 %	23.4 %	Energy	16,330	(1.3) %	22.9 %
IT	15,339	(0.1) %	20.7 %	Pharma	9,149	(1.0) %	6.1 %
Metals	2,982	0.1 %	(15.7) %	Finance	12,303	(0.2) %	19.9 %
Auto	8,215	(0.9) %	(25.7) %	PSU	3,229	1.6 %	13.1 %
FMCG	29,891	(0.2) %	12.8 %	Real Estate	263	(0.5) %	(11.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Pru	349	9.0 %	(9.2) %	Vodafone I	29	(3.7) %	(63.4) %
Yes Bank	268	5.8 %	(12.3) %	Dabur Indi	411	(3.3) %	22.4 %
IndusInd B	1,804	5.2 %	(0.0) %	DLF	190	(3.1) %	(5.3) %
New India	194	4.2 %	(44.8) %	H P C L	269	(2.8) %	(21.9) %
Shriram Tr	1,246	3.5 %	(15.2) %	NMDC	102	(2.8) %	(13.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Job vacancies (FEB)	28-03-2019	00:30	AUD	-	0.013
CFIB Business Barometer (MAR)	28-03-2019	10:00	CAD	-	59
SNB's Maechler Speaks in Zurich	28-03-2019	17:00	CHF	-	-
Euro-Zone M3 Money Supply (YoY) (FEB)	28-03-2019	09:00	EUR	-	0.038
ECB's Guindos Speaks in Frankfurt	28-03-2019	09:10	EUR	-	-
Euro-Zone Business Climate Indicator (MAR)	28-03-2019	10:00	EUR	-	0.69
Euro-Zone Consumer Confidence (MAR F)	28-03-2019	10:00	EUR	-	(7.2)
Euro-Zone Economic Confidence (MAR)	28-03-2019	10:00	EUR	-	106.1
Euro-Zone Industrial Confidence (MAR)	28-03-2019	10:00	EUR	-	(0.4)
Euro-Zone Services Confidence (MAR)	28-03-2019	10:00	EUR	-	12.1
German Consumer Price Index (MoM) (MAR P)	28-03-2019	13:00	EUR	-	0.004
German Consumer Price Index (YoY) (MAR P)	28-03-2019	13:00	EUR	-	0.015
Jobless Rate (FEB)	28-03-2019	23:30	JPY	-	0.025
Job-To-Applicant Ratio (FEB)	28-03-2019	23:30	JPY	-	1.63
Tokyo Consumer Price Index (YoY) (MAR)	28-03-2019	23:30	JPY	-	0.006
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (MAR)	28-03-2019	23:30	JPY	-	0.011
Tokyo Consumer Price Index Ex-Fresh Food, Energy (YoY) (MAR)	28-03-2019	23:30	JPY	-	0.007
Industrial Production (MoM) (FEB P)	28-03-2019	23:50	JPY	-	(0.034)
Industrial Production (YoY) (FEB P)	28-03-2019	23:50	JPY	-	0.003
Large Retailers' Sales (FEB)	28-03-2019	23:50	JPY	-	(0.033)
Retail Trade (YoY) (FEB)	28-03-2019	23:50	JPY	-	0.006
Retail Trade s.a. (MoM) (FEB P)	28-03-2019	23:50	JPY	-	(0.023)
Overnight Rate (MAR 28)	28-03-2019	19:00	MXN	-	0.0825
ANZ Activity Outlook (MAR)	28-03-2019	00:00	NZD	-	10.5
ANZ Business Confidence (MAR)	28-03-2019	00:00	NZD	-	(30.9)
ANZ Consumer Confidence (MoM) (MAR)	28-03-2019	21:00	NZD	-	(0.007)
ANZ Consumer Confidence Index (MAR)	28-03-2019	21:00	NZD	-	120.8
Building Permits (MoM) (FEB)	28-03-2019	21:45	NZD	-	0.165
ECB's Guindos Speaks at ECB Conference in Frankfurt	28-03-2019	11:15	USD	-	-



Continuing Claims (MAR 16)	28-03-2019	12:30	USD	-	-
Core PCE (QoQ) (4Q T)	28-03-2019	12:30	USD	-	0.017
Gross Domestic Product Annualized (QoQ) (4Q T)	28-03-2019	12:30	USD	-	0.026
Gross Domestic Product Price Index (4Q T)	28-03-2019	12:30	USD	-	0.018
Initial Jobless Claims (MAR 23)	28-03-2019	12:30	USD	-	-
Personal Consumption (4Q T)	28-03-2019	12:30	USD	-	0.028
Fed's Clarida Speaks at Bank of France Conference in Paris	28-03-2019	13:30	USD	-	-
Fed's Bowman Discusses Agriculture and Community Banking	28-03-2019	14:00	USD	-	-
Pending Home Sales (MoM) (FEB)	28-03-2019	14:00	USD	-	0.046
Pending Home Sales (YoY) (FEB)	28-03-2019	14:00	USD	-	(0.032)
EIA Working Natural Gas Implied Flow (MAR 22)	28-03-2019	14:30	USD	-	(47)
Kansas City Fed Manf. Activity (MAR)	28-03-2019	15:00	USD	-	1
U.S. to Sell 4-Week Bills	28-03-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	28-03-2019	15:30	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	28-03-2019	17:00	USD	-	-
Fed's Williams Visits Puerto Rico	28-03-2019	17:15	USD	-	-
Fed's Bullard Speaks at Madison, Wisconsin	28-03-2019	21:20	USD	-	-

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