



01 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,746	0.1 %	5.2 %
BSE SENSEX	35,322	1.2 %	6.3 %
CNX BANK	26,856	(0.4) %	10.4 %
CNX MIDCAP	18,865	(0.2) %	(1.2) %
CNX SMALLCAP	7,841	0.1 %	(1.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,416	(1.0) %	(1.6) %
S&P 500	2,705	(0.7) %	0.4 %
FTSE 100	7,678	(0.2) %	0.4 %
HANG SENG	30,469	1.4 %	(0.2) %
NIKKEI	22,202	0.8 %	(5.5) %
SHANGHAI COMPOSITE	3,095	1.8 %	(7.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.41	(0.7) %	5.9 %
EUR/USD	1.17	1.5 %	(2.6) %
GBP/USD	1.33	0.3 %	(1.7) %
USD/JPY	109.08	0.5 %	(3.2) %
USD/AUD	1.32	(1.1) %	3.4 %
USD/SGD	1.34	(0.6) %	0.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	2.2 %	13.0 %
Gold(INR/10g)	31,026	0.3 %	5.7 %
Gold Comex(USD/oz)	1,307	0.3 %	(0.1) %
SILVER(INR/1Kg)	39,803	1.0 %	3.1 %
Aluminium(USD/MT)	2,266	0.2 %	0.4 %
Copper(USD/MT)	6,810	(0.5) %	(5.2) %

FIXED INCOME

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

Global Economy: A report released by MNI Indicators on Thursday showed business activity in the Chicago-area gained significant traction in the month of May. MNI Indicators said its Chicago business barometer jumped to 62.7 in May from 57.6 in April, with a reading above 50 indicating growth. Eurozone unemployment rate fell to 8.5% in April from 8.6% in March, Eurostat reported Thursday. This was the lowest since December 2008. Nonetheless, the rate was slightly above the expected 8.4%. Data showed that unemployment totaled 13.88 million in April, down by 56,000 from the previous month. The overall unemployment rate in EU28 held steady at 7.1% in April, the lowest since September 2008. Eurozone inflation accelerated to 1.9% in May largely on energy prices, from 1.2% in April, flash estimate from Eurostat showed. The European Central Bank targets 'below, but close to 2% inflation. Core inflation that excludes prices of energy, food, alcohol and tobacco, also increased to 1.1% in May from 0.7% a month ago.

Global Equities: DOW fell as The Trump administration said tariffs on steel and aluminum imports from EU, Canada and Mexico will take effect at midnight Thursday.

Indian Economy: Indian economy recorded an impressive 7.7% surge in the three months through March from a year earlier, government data showed. The economy grew at 6.7% in the fiscal year 2017-18, marginally higher than the 6.6% expansion projected in February. The Gross Value Added (GVA) grew 6.5% in 2017-18, slower than the previous year's 7.1%. However, in the quarter-ended March, GVA grew at 7.6%, up from 6.6% in October-December.

Equity Markets: Index linked counters pulled up an excellent rally for local stocks. Key equity benchmarks logged strong gains. The barometer index, the S&P BSE Sensex, rose 416.27 points or 1.19% to settle at 35,322.38. The Nifty 50 index rose 121.80 points or 1.15% to settle at 10,736.15. The Sensex settled well above the psychological 35,000 level after moving above and below that level in intraday trade. Positive global stocks also boosted sentiment.

Corporate News: The Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP). The combined Index of Eight Core Industries stands at 124.2 in April, 2018, which was 4.7% higher as compared to the index of April, 2017. Its cumulative growth during April to March, 2017-18 was 4.3%. Coal production (weight: 10.33%) increased by 16% in April, 2018 over April, 2017. Its cumulative index increased by 2.6% during April to March, 2017-18 over corresponding period of the previous year. Petroleum Refinery production (weight: 28.04%) increased by 2.7% in April, 2018 over April, 2017. Its cumulative index increased by 4.6% during April to March, 2017-18 over the corresponding period of previous year. Steel production (weight: 17.92%) increased by 3.5% in April, 2018 over April, 2017. Its cumulative index increased by 5.6% during April to March, 2017-18 over the corresponding period of previous year. The closure of Vedanta Resources PLC's Indian copper smelter is marginally negative for the company and will not materially affect its cash flows, S&P Global Ratings said, according to media reports. Idea Cellular said that it has completed the sale of its standalone 9,900 towers to ATC Telecom Infrastructure Private Limited (ATC) for Rs 4,000 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(159.8)	(64.3)	(55.6)
MF(INR cr)	365.4	587.5	543.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	63,344	35,306	34,631
F&O(INR cr)	1,834,938	879,185	813,077

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.9	14.1	16.1
NSE VIX	13.2	13.6	13.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,956	2.4 %	10.8 %	Energy	13,523	0.9 %	1.7 %
IT	13,666	0.8 %	7.5 %	Pharma	8,220	(1.2) %	(4.6) %
Metals	3,594	(0.5) %	1.5 %	Finance	11,132	2.1 %	8.5 %
Auto	10,994	(0.3) %	(0.6) %	PSU	2,969	0.3 %	4.0 %
FMCG	28,814	0.5 %	8.7 %	Real Estate	295	(0.7) %	(0.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oracle Fin	3,943	4.8 %	0.1 %	Bharat Ele	114	(4.2) %	(21.0) %
Adani Port	392	4.7 %	6.1 %	General In	725	(3.0) %	(2.0) %
HDFC Bank	2,139	4.4 %	10.8 %	Sun Pharma	480	(2.9) %	(5.4) %
IndusInd B	1,955	3.7 %	8.4 %	Punjab Nat	84	(2.8) %	(13.1) %
Tech Mahin	712	3.7 %	11.3 %	Pidilite I	1,158	(2.5) %	23.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
CoreLogic House Px (MoM) (MAY)	01-06-2018	0:00	AUD	-	(0.003)
Commodity Index AUD (MAY)	01-06-2018	6:30	AUD	-	109
RBA Commodity Index SDR (YoY) (MAY)	01-06-2018	6:30	AUD	-	(0.014)
MLI Leading Indicator (MoM) (APR)	01-06-2018	12:30	CAD	-	0.001
RBC Canadian Manufacturing PMI (MAY)	01-06-2018	13:30	CAD	-	55.5
PMI Manufacturing (MAY)	01-06-2018	7:30	CHF	-	63.6
Caixin China PMI Mfg (MAY)	01-06-2018	1:45	CNY	-	51.1
Markit/ADACI Italy Manufacturing PMI (MAY)	01-06-2018	7:45	EUR	-	53.5
Markit France Manufacturing PMI (MAY F)	01-06-2018	7:50	EUR	-	55.1
Markit/BME Germany Manufacturing PMI (MAY F)	01-06-2018	7:55	EUR	-	56.8
Italian Gross Domestic Product w.d.a. (QoQ) (1Q F)	01-06-2018	8:00	EUR	-	0.003
Italian Gross Domestic Product w.d.a. (YoY) (1Q F)	01-06-2018	8:00	EUR	-	0.014
Markit Eurozone Manufacturing PMI (MAY F)	01-06-2018	8:00	EUR	-	55.5
Markit UK PMI Manufacturing s.a. (MAY)	01-06-2018	8:30	GBP	-	53.9
Nikkei Japan PMI Manufacturing (MAY F)	01-06-2018	0:30	JPY	-	52.5
Vehicle Sales (YoY) (MAY)	01-06-2018	5:00	JPY	-	0.005
Fed's Kaplan Speaks in Dallas	01-06-2018	0:30	USD	-	-
Average Hourly Earnings (MoM) (MAY)	01-06-2018	12:30	USD	-	0.001
Average Hourly Earnings (YoY) (MAY)	01-06-2018	12:30	USD	-	0.026
Average Weekly Hours All Employees (MAY)	01-06-2018	12:30	USD	-	34.5
Change in Manufact. Payrolls (MAY)	01-06-2018	12:30	USD	-	-
Change in Non-farm Payrolls (MAY)	01-06-2018	12:30	USD	-	-
Change in Private Payrolls (MAY)	01-06-2018	12:30	USD	-	-
Labor Force Participation Rate (MAY)	01-06-2018	12:30	USD	-	0.628
Two-Month Payroll Net Revision (MAY)	01-06-2018	12:30	USD	-	-
Underemployment Rate (MAY)	01-06-2018	12:30	USD	-	0.078
Unemployment Rate (MAY)	01-06-2018	12:30	USD	-	0.039
Fed's Kashkari Speaks in Minneapolis	01-06-2018	12:55	USD	-	-
Markit US Manufacturing PMI (MAY F)	01-06-2018	12:45	USD	-	56.6



Construction Spending (MoM) (APR)	01-06-2018	14:00	USD	-	(0.017)
ISM Employment (MAY)	01-06-2018	14:00	USD	-	54.2
ISM Manufacturing (MAY)	01-06-2018	14:00	USD	-	57.3
ISM New Orders (MAY)	01-06-2018	14:00	USD	-	61.2
ISM Prices Paid (MAY)	01-06-2018	14:00	USD	-	79.3
Baker Hughes U.S. Rig Count (1 JUN)	01-06-2018	17:00	USD	-	1059

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