



02 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,743	0.0 %	5.2 %
BSE SENSEX	35,160	0.5 %	5.9 %
CNX BANK	25,625	0.4 %	5.3 %
CNX MIDCAP	20,213	(0.4) %	5.8 %
CNX SMALLCAP	8,408	0.2 %	6.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,099	(0.3) %	(2.9) %
S&P 500	2,655	0.3 %	(1.5) %
FTSE 100	7,520	0.2 %	(1.7) %
HANG SENG	30,808	1.7 %	1.0 %
NIKKEI	22,508	0.2 %	(4.2) %
SHANGHAI COMPOSITE	3,082	0.2 %	(7.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	66.66	(0.1) %	4.7 %
EUR/USD	1.21	0.2 %	1.0 %
GBP/USD	1.38	(1.0) %	2.0 %
USD/JPY	109.05	(0.1) %	(3.3) %
USD/AUD	1.32	(0.4) %	3.2 %
USD/SGD	1.32	(0.3) %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	(1.2) %	11.4 %
Gold(INR/10g)	31,033	(0.5) %	5.7 %
Gold Comex(USD/oz)	1,310	(1.1) %	0.1 %
SILVER(INR/1Kg)	38,777	(1.2) %	0.4 %
Aluminium(USD/MT)	2,258	0.4 %	0.1 %
Copper(USD/MT)	6,778	(0.3) %	(5.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

Global Economy: Growth in US manufacturing activity slowed by more than anticipated in the month of April, according to a report released by the Institute for Supply Management on Tuesday. The ISM said its purchasing managers index dropped to 57.3 in April from 59.3 in March, although a reading above 50 still indicates growth in the manufacturing sector. The decrease by the headline index was partly due to a notable decline by the production index, which slumped to 57.2 in April from 61.0 in March. The employment index also dropped to 54.2 in April from 57.3 in March, indicating a slowdown in the pace of job growth in the manufacturing sector. UK manufacturing activity expanded at the slowest pace in 17 months in April, survey data from IHS Markit showed. The Markit/Chartered Institute of Procurement & Supply factory Purchasing Managers' Index fell to 53.9 in April from 54.9 in March.

Global Equities: The US stocks closed mixed traders looked ahead to the Federal Reserve's monetary policy announcement due Wednesday.

Indian Economy: The growth of India's core industries slowed to 4.1% in March as output of refinery products, fertilisers, steel and cement moderated. Core sector had grown 5.4% in February and 5.2% in March last year. Official data released by commerce and industry ministry on Tuesday showed growth only in the production of natural gas and coal. For the full year, core sector growth was 4.2% compared with 4.8% in 2016-17.

Equity Markets: Local stocks settled higher on Monday, in tandem with global markets, as IT and banks shares gained. The Sensex settled above the psychologically important 35,000 mark. The Indian stock market was shut on Tuesday, 1 May 2018, on account of Maharashtra Day. The market breadth, indicating the overall health of the market, was positive. On BSE, 1,404 shares rose and 1,255 shares fell. A total of 148 shares were unchanged.

Corporate News: Maruti Suzuki India reported a 14.4% increase in total sales at 1,72,986 units in April 2018 against 1,51,215 units in April 2017. The company's domestic sales stood at 1,64,978 units, up 14.2% from 1,44,492 units in April last year, the company said in a statement. Tata Motors registered a growth of 86% at 53,511 units in April 2018 as against 28,844 units in April 2017 due to the continued strong sales performance of its commercial and passenger vehicles business in the domestic market. Mahindra & Mahindra (M&M) reported a 22% growth in its auto sales at 48,097 vehicles in in April 2018 against 39,417 vehicles during April 2017. Larsen & Toubro (L&T) signed definitive agreements with Schneider Electric, a global player in energy management and automation for strategic divestment of L&T's Electrical and Automation (E&A) business for an all-cash consideration of Rs 14000 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	0.0	(42.3)	(42.3)
MF(INR cr)	578.9	480.4	480.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,452	33,956	33,956
F&O(INR cr)	432,408	743,820	743,820

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.5	15.5	18.2
NSE VIX	12.4	13.9	13.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,532	0.5 %	4.9 %	Energy	13,770	(1.9) %	3.6 %
IT	13,986	1.4 %	10.1 %	Pharma	9,061	0.8 %	5.1 %
Metals	3,775	0.3 %	6.6 %	Finance	10,676	0.6 %	4.0 %
Auto	11,626	0.4 %	5.1 %	PSU	2,864	1.7 %	0.3 %
FMCG	28,773	1.2 %	8.6 %	Real Estate	322	1.6 %	8.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bank of Ba	149	4.0 %	5.0 %	Axis Bank	517	(4.1) %	3.7 %
Yes Bank	362	3.8 %	18.2 %	Reliance I	963	(3.3) %	7.9 %
Marico	333	3.6 %	1.3 %	UPL	730	(3.2) %	(3.0) %
L&T Fin.Ho	173	2.6 %	7.9 %	Bharti Inf	313	(2.2) %	(7.3) %
Siemens	1,122	2.5 %	1.9 %	SBI Life I	743	(2.1) %	8.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Service Index (APR)	02-05-2018	22:30	AUD	-	56.9
CBA Australia PMI Composite (APR)	02-05-2018	23:00	AUD	-	55.4
CBA Australia PMI Services (APR)	02-05-2018	23:00	AUD	-	55.6
SECO Consumer Confidence (APR)	02-05-2018	05:45	CHF	-	5
Retail Sales Real (YoY) (MAR)	02-05-2018	07:15	CHF	-	(0.002)
PMI Manufacturing (APR)	02-05-2018	07:30	CHF	-	60.3
Caixin China PMI Mfg (APR)	02-05-2018	01:45	CNY	-	51
Markit/ADACI Italy Manufacturing PMI (APR)	02-05-2018	07:45	EUR	-	55.1
Markit France Manufacturing PMI (APR F)	02-05-2018	07:50	EUR	-	53.4
Markit/BME Germany Manufacturing PMI (APR F)	02-05-2018	07:55	EUR	-	58.1
Markit Eurozone Manufacturing PMI (APR F)	02-05-2018	08:00	EUR	-	56
Euro-Zone Gross Domestic Product s.a. (QoQ) (1Q A)	02-05-2018	09:00	EUR	-	0.006
Euro-Zone Gross Domestic Product s.a. (YoY) (1Q A)	02-05-2018	09:00	EUR	-	0.027
Euro-Zone Unemployment Rate (MAR)	02-05-2018	09:00	EUR	-	0.085
Italian Gross Domestic Product w.d.a. (QoQ) (1Q P)	02-05-2018	09:00	EUR	-	0.003
Italian Gross Domestic Product w.d.a. (YoY) (1Q P)	02-05-2018	09:00	EUR	-	0.016
Markit/CIPS UK Construction PMI (APR)	02-05-2018	08:30	GBP	-	47
Nikkei Japan PMI Composite (APR)	02-05-2018	00:30	JPY	-	51.3
Nikkei Japan PMI Services (APR)	02-05-2018	00:30	JPY	-	50.9
Consumer Confidence Index (APR)	02-05-2018	05:00	JPY	-	44.3
ANZ Job Advertisements (MoM) (APR)	02-05-2018	22:00	NZD	-	0.009
MBA Mortgage Applications (APR 27)	02-05-2018	11:00	USD	-	(0.002)
ADP Employment Change (APR)	02-05-2018	12:15	USD	-	-
DOE Cushing OK Crude Inventory (APR 27)	02-05-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (APR 27)	02-05-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (APR 27)	02-05-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (APR 27)	02-05-2018	14:30	USD	-	-
FOMC Rate Decision (Lower Bound) (MAY 2)	02-05-2018	18:00	USD	-	0.015
FOMC Rate Decision (Lower Bound) (MAY 2)	02-05-2018	18:00	USD	-	0.0175



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