



02 May.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,736	(0.1) %	0.6 %
BSE SENSEX	39,032	(0.1) %	0.4 %
CNX BANK	29,765	0.0 %	(1.9) %
CNX MIDCAP	17,566	0.0 %	(4.2) %
CNX SMALLCAP	6,468	0.0 %	(4.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,430	(0.6) %	13.3 %
S&P 500	2,924	(0.8) %	16.6 %
FTSE 100	7,385	(0.4) %	9.7 %
HANG SENG	29,699	(0.7) %	18.2 %
NIKKEI	22,259	(0.2) %	13.8 %
SHANGHAI COMPOSITE	3,078	0.5 %	24.9 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.87	(0.5) %	0.6 %
EUR/USD	1.12	0.2 %	(2.5) %
GBP/USD	1.29	0.3 %	1.4 %
USD/JPY	111.71	(0.1) %	1.9 %
USD/AUD	1.42	(0.6) %	(0.2) %
USD/SGD	1.36	(0.1) %	(0.2) %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	1.1 %	36.4 %
Gold(INR/10g)	31,723	(0.1) %	0.6 %
Gold Comex(USD/oz)	1,277	0.0 %	(1.1) %
SILVER(INR/1Kg)	37,272	(0.7) %	(2.6) %
Aluminium(USD/MT)	1,816	(0.9) %	(2.3) %
Copper(USD/MT)	6,376	(0.3) %	9.2 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	0.0 %	(0.1) %

**Global Economy:** The US Federal Reserve announced on Wednesday that it has decided to leave interest rates unchanged. The Fed maintained the target range for the federal funds rate at 2.25 to 2.50% for the third consecutive meeting. Fed said information received since its previous meeting in March showed economic activity rose at a solid rate. It noted that the labor market remains strong but pointed out slower first quarter growth in household spending and business fixed investment. The ISM said its US purchasing managers index fell to 52.8 in April after climbing to 55.3 in March, hitting its lowest level since October of 2016. A report released by the Commerce Department on Wednesday showed a pullback in US construction spending in the month of March. The report said construction spending tumbled by 0.9% to an annual rate of \$1.282 trillion in March after climbing by 0.7% to a revised rate of \$1.293 trillion in February. UK manufacturing expansion slowed to a two-month low. The IHS Markit/CIPS Purchasing Managers' Index, or PMI, fell to 53.1 in April from March's 13-month high of 55.1.

**Global Equities:** US stocks extended recent upmove to hit a record as the Federal Reserve kept interest rates unchanged.

**Indian Economy:** The eight infrastructure sectors that constitute 40.27% of the index of industrial production (IIP) recovered to post a growth rate of 4.7% in March, hitting a five-month high as production of steel and cement too grew at a robust pace. For the full year of 2018-19, however, the core sector rose at a slower pace of 4.3% against 4.8% in the previous year. Revenue collections from the Goods and Services Tax hit a record ₹1.13 lakh crore in April 2019, according to official data released on Wednesday. The government had collected ₹1.06 lakh crore in March.

**Equity Markets:** Key indices ended with small losses after a volatile trading session on Tuesday. The Sensex closed above 39,000 mark and the Nifty closed above 11,700 mark after falling steeply below these levels in morning trade.

**Corporate News:** Britannia Industries reported an 11.82% increase in consolidated net profit at Rs 294.27 crore for the fourth quarter ended March 31, 2019. For FY19, the company's net profit was at Rs 1,155.46 crore as against Rs 1,003.96 crore, up 15%. Passenger Vehicles sales of Maruti -India's largest carmaker continued to remain under pressure in the new financial year. Maruti Suzuki has recorded a slump of 19.6% in volumes in April 2019 selling 133,704 units against 164,978 units in the same month last year. Ambuja Cements' consolidated net profit rose 27.08% to Rs 495.44 crore on 8.37% rise in total income to Rs 7097.82 crore in Q1 March 2019 over Q1 March 2018. TVS Motor Company's net profit fell 19.19% to Rs 133.83 crore on 9.23% rise in total income to Rs 4387.60 crore in Q4 March 2019 over Q4 March 2018.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	551.1	178.2	178.2
MF(INR cr)	822.6	(317.8)	(317.8)

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	13,795	35,006	35,006
F&O(INR cr)	1,184,030	1,187,120	1,187,120

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.1	12.9	12.9
NSE VIX	21.8	21.1	21.1

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,765	(0.8) %	(1.9) %	Energy	16,500	0.4 %	(0.2) %
IT	16,705	1.2 %	5.5 %	Pharma	9,403	(0.6) %	0.3 %
Metals	3,089	1.4 %	(0.4) %	Finance	12,555	0.4 %	0.4 %
Auto	8,351	(1.7) %	(0.8) %	PSU	3,056	(3.3) %	(9.7) %
FMCG	30,337	(0.3) %	0.5 %	Real Estate	258	(2.3) %	(3.3) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HDFC AMC	1,695	5.1 %	8.9 %	Yes Bank	168	(29.2) %	(39.1) %
JSW Steel	308	4.9 %	5.5 %	Indiabulls	695	(5.8) %	(17.9) %
HCL Techno	1,183	3.8 %	6.5 %	Bajaj Hold	3,086	(5.6) %	(7.9) %
Zee Entert	433	3.6 %	0.2 %	IndusInd B	1,607	(5.4) %	(7.8) %
I O C L	158	3.4 %	(0.4) %	Bank of Ba	117	(5.4) %	(12.1) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Service Index (APR)	02-05-2019	22:30	AUD	-	44.8
CBA Australia PMI Composite (APR F)	02-05-2019	23:00	AUD	-	50.6
CBA Australia PMI Services (APR F)	02-05-2019	23:00	AUD	-	50.5
Retail Sales Real (YoY) (MAR)	02-05-2019	06:30	CHF	-	(0.002)
PMI Manufacturing (APR)	02-05-2019	07:30	CHF	-	50.3
German Retail Sales (MoM) (MAR)	02-05-2019	06:00	EUR	-	0.009
German Retail Sales (YoY) (MAR)	02-05-2019	06:00	EUR	-	0.047
Markit/ADACI Italy Manufacturing PMI (APR)	02-05-2019	07:45	EUR	-	47.4
Markit France Manufacturing PMI (APR F)	02-05-2019	07:50	EUR	-	49.6
Markit/BME Germany Manufacturing PMI (APR F)	02-05-2019	07:55	EUR	-	44.5
Markit Eurozone Manufacturing PMI (APR F)	02-05-2019	08:00	EUR	-	47.8
Challenger Job Cuts (YoY) (APR)	02-05-2019	11:30	EUR	-	0.004
ECB's Praet Speaks in Vienna	02-05-2019	17:30	EUR	-	-
Markit/CIPS UK Construction PMI (APR)	02-05-2019	08:30	GBP	-	49.7
Bank of England Bank Rate (MAY 2)	02-05-2019	11:00	GBP	-	0.0075
Bank of England Inflation Report	02-05-2019	11:00	GBP	-	-
BOE Asset Purchase Target (MAY)	02-05-2019	11:00	GBP	-	-
BOE Corporate Bond Target (MAY)	02-05-2019	11:00	GBP	-	-
BOE's Carney speaks at press conference in London	02-05-2019	11:30	GBP	-	-
Markit Mexico PMI Mfg (APR)	02-05-2019	14:30	MXN	-	49.8
Continuing Claims (APR 20)	02-05-2019	12:30	USD	-	-
Initial Jobless Claims (APR 27)	02-05-2019	12:30	USD	-	-
Nonfarm Productivity (1Q P)	02-05-2019	12:30	USD	-	0.019
Unit Labor Costs (1Q P)	02-05-2019	12:30	USD	-	0.02
Cap Goods Orders Nondef Ex Air (MAR F)	02-05-2019	14:00	USD	-	0.013
Cap Goods Ship Nondef Ex Air (MAR F)	02-05-2019	14:00	USD	-	(0.002)
Durable Goods Orders (MAR F)	02-05-2019	14:00	USD	-	0.027
Durables Ex Transportation (MAR F)	02-05-2019	14:00	USD	-	0.004
Fast-Moving Consumer Goods (MAR F)	02-05-2019	14:00	USD	-	(0.005)



Factory Orders Ex Trans (MAR)	02-05-2019	14:00	USD	-	0.003
EIA Natural Gas Storage Change (APR 26)	02-05-2019	14:30	USD	-	92
U.S. to Sell 4-Week Bills	02-05-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	02-05-2019	15:30	USD	-	-

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