



03 May.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,336	0.2 %	1.1 %
BSE SENSEX	29,921	0.0 %	0.1 %
CNX BANK	22,351	0.0 %	3.7 %
CNX MIDCAP	18,240	0.3 %	5.2 %
CNX SMALLCAP	7,500	0.6 %	6.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,950	0.2 %	5.4 %
S&P 500	2,391	0.1 %	5.9 %
FTSE 100	7,250	0.6 %	1.0 %
HANG SENG	24,696	0.3 %	11.5 %
NIKKEI	19,446	0.7 %	(0.8) %
SHANGHAI COMPOSITE	3,144	(0.4) %	0.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.21	(0.1) %	(4.8) %
EUR/USD	1.09	0.4 %	3.2 %
GBP/USD	1.29	(0.1) %	5.2 %
USD/JPY	112.02	0.5 %	(3.4) %
USD/AUD	1.33	(0.4) %	(2.8) %
USD/SGD	1.39	(0.3) %	(2.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	(2.4) %	(8.9) %
Gold(INR/10g)	28,634	(0.9) %	3.0 %
Gold Comex(USD/oz)	1,257	(0.0) %	8.7 %
SILVER(INR/1Kg)	39,143	(2.2) %	0.6 %
Aluminium(USD/MT)	1,909	(1.2) %	12.2 %
Copper(USD/MT)	5,746	1.0 %	3.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	(0.0) %	(0.2) %

Global Economy: Eurozone manufacturing activity expanded at the fastest pace in six years in April, final data from IHS Markit showed Tuesday. The factory Purchasing Managers' Index (PMI) rose to 56.7 in April from 56.2 in March. The British manufacturing expanded the most in three years in April underpinned by new orders signaling a strong start to the second quarter, survey results from IHS Markit and the Chartered Institute of Procurement & Supply showed Tuesday. The Markit/CIPS PMI for the manufacturing sector climbed unexpectedly to 57.3 in April from March's 4-month low of 54.2. Despite the inclusion of the yuan in the IMF's Special Drawing Rights, progress toward the Chinese currency becoming a more important global currency has lost momentum over the last two years, Fitch Ratings noted in a latest update.

Global Equities: Choppy moves extended for US equities. Stocks continued to show a lack of direction during trading on Tuesday. The major averages spent the day bouncing back and forth across the unchanged line

Indian Economy: Manufacturing conditions in India improved for the fourth straight month in April. The upturn was signalled by the headline Nikkei India Manufacturing Purchasing Managers' IndexTM (PMITM) - a diffusion index designed to measure the performance of the sector matching March's reading of 52.5. Slower increases in output, stocks of purchases and employment were offset by stronger growth of new orders and lengthening delivery times. Survey participants attributed new business wins to improving demand conditions and greater advertising. Overall, the upturn in order books was the most pronounced since last October. New export orders rose for the third month in a row, but the rate of expansion eased from March and was slight overall. Concurrently, output grew solidly, though growth softened slightly since the preceding survey period.

Equity Markets: Firmness in global stocks helped key benchmark indices snap two-day losing streak and settle with tiny gains after listless and rangebound session of trade. The Sensex settled below the psychological 30,000 level. Shares of most public sector banks gained. Shares of private sector banks were mixed. Telecom stocks declined

Corporate News: ICICI Bank would be in focus as it will declare its Q4 March 2017 results today, 3 May 2017. TCS said it has been selected by one of Europe's largest utilities companies Vattenfall- to provide IT services across multiple European operations including Sweden, Germany and the Netherlands. The announcement was made after market hours yesterday, 2 May 2017. Wipro said it has unveiled its new brand identity. The new brand identity signifies a higher level of engagement and brand permission that helps clients leverage Wipro's expertise to address their business requirements and drive future opportunities in this digital era. As part of the new brand identity, Wipro unveiled a new logo. Nestle India announced the launch of exciting new range of noodles - MAGGI Masalas of India. The new range of MAGGI noodles consists of four new flavors-Amritsari Achari, Mumbaiya Chatak, Super Chennai and Bengali Jhaal. Marico's consolidated net profit rose 25.5% to Rs 170.91 crore on 1.98% rise in total income to Rs 1344.43 crore in Q4 March 2017 over Q4 March 2016.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(173.4)	(19.2)	(19.2)
MF(INR cr)	803.6	489.5	489.5

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	30,038	30,038	30,379
F&O(INR cr)	364,622	364,622	517,069

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.6	10.4	12.9
NSE VIX	11.5	11.5	11.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,341	(0.1) %	3.7 %	Energy	12,243	(0.2) %	3.6 %
IT	10,006	0.6 %	(5.5) %	Pharma	10,036	(0.8) %	(4.4) %
Metals	2,957	(0.6) %	(4.8) %	Finance	9,118	0.6 %	3.3 %
Auto	10,295	0.4 %	3.8 %	PSU	3,655	(0.1) %	3.7 %
FMCG	23,755	0.3 %	0.5 %	Real Estate	256	1.8 %	16.7 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Indiabulls	1,073	5.5 %	7.7 %	Glaxosmit	2,418	(3.1) %	(11.6) %
LIC Housin	705	5.5 %	12.9 %	Shriram Tr	1,009	(2.9) %	(8.6) %
Rural Elec	213	5.0 %	18.3 %	Tata Motor	273	(2.6) %	(3.0) %
United Spi	1,936	3.2 %	(5.4) %	Lupin	1,304	(2.6) %	(9.1) %
Titan Comp	485	3.2 %	5.6 %	Bharti Air	348	(2.2) %	1.7 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Euro-Zone Gross Domestic Product s.a. (QoQ) (1Q A)	03-05-2017	9:00	EUR	-	0.004
Euro-Zone Gross Domestic Product s.a. (YoY) (1Q A)	03-05-2017	9:00	EUR	-	0.017
Euro-Zone Producer Price Index (MoM) (MAR)	03-05-2017	9:00	EUR	-	0
Euro-Zone Producer Price Index (YoY) (MAR)	03-05-2017	9:00	EUR	-	0.045
German Unemployment Change (APR)	03-05-2017	7:55	EUR	-	-
German Unemployment Rate s.a. (APR)	03-05-2017	7:55	EUR	-	0.058
Markit/CIPS UK Construction PMI (APR)	03-05-2017	8:30	GBP	-	52.2
ANZ Job Advertisements (MoM) (APR)	03-05-2017	22:00	NZD	-	0.016
ADP Employment Change (APR)	03-05-2017	12:15	USD	-	-
DOE Cushing OK Crude Inventory (APR 28)	03-05-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (APR 28)	03-05-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (APR 28)	03-05-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (APR 28)	03-05-2017	14:30	USD	-	-
Federal Open Market Committee Rate Decision (MAY 03)	03-05-2017	18:00	USD	-	0.01
FOMC Rate Decision (Lower Bound) (MAY 03)	03-05-2017	18:00	USD	-	0.0075
ISM Non-Manufacturing Composite Index	03-05-2017	14:00	USD	-	55.2
ISM Services/Non-Manufacturing Composite (APR)	03-05-2017	14:00	USD	-	55.2
Markit US Composite PMI (APR F)	03-05-2017	13:45	USD	-	52.7
Markit US Services PMI (APR F)	03-05-2017	13:45	USD	-	52.5
MBA Mortgage Applications (APR 28)	03-05-2017	11:00	USD	-	0.027

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