



03 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,725	0.0 %	0.5 %
BSE SENSEX	38,981	(0.1) %	0.6 %
CNX BANK	29,709	0.0 %	(2.0) %
CNX MIDCAP	17,461	0.0 %	(4.8) %
CNX SMALLCAP	6,467	0.0 %	(4.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,308	(0.5) %	12.8 %
S&P 500	2,918	(0.2) %	16.4 %
FTSE 100	7,351	(0.5) %	9.2 %
HANG SENG	29,944	0.8 %	19.2 %
NIKKEI	22,259	(0.2) %	13.8 %
SHANGHAI COMPOSITE	3,078	0.5 %	24.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.60	(0.9) %	0.2 %
EUR/USD	1.12	0.7 %	(2.0) %
GBP/USD	1.31	1.3 %	2.5 %
USD/JPY	111.39	(0.4) %	1.6 %
USD/AUD	1.42	(0.4) %	(0.1) %
USD/SGD	1.36	(0.3) %	(0.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	(3.3) %	32.8 %
Gold(INR/10g)	31,310	(1.3) %	(0.7) %
Gold Comex(USD/oz)	1,272	(0.3) %	(1.4) %
SILVER(INR/1Kg)	36,474	(2.1) %	(4.7) %
Aluminium(USD/MT)	1,801	1.4 %	(3.1) %
Copper(USD/MT)	6,214	(2.9) %	6.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	0.1 %	(0.1) %

Global Economy: A report released by the Commerce Department on Thursday showed new orders for US manufactured goods jumped in the month of March amid a substantial rebound in orders for transportation equipment. The Commerce Department said factory orders spiked by 1.9% in March after falling by a revised 0.3% in February. Eurozone's manufacturing sector contracted at a slower pace in April, survey data from IHS Markit showed on Thursday. The Manufacturing purchasing managers' index, or PMI, rose to 47.9 in April from 47.5 in March. The flash reading was 47.8 in April. The manufacturing sector has contracted for the three successive months now. Bank of England raised the growth outlook on Thursday and signaled that interest rates may need to be tightened more than what markets currently expect. The nine-member Monetary Policy Committee held the bank rate unchanged at 0.75%. Germany's retail sales dropped for the first time in three months, data from the Federal Statistical Office showed. Retail sales declined 2.1% year-on-year in March, after a 4.4% rise in February, which was revised from 4.7%. On a monthly basis, retail sales fell a seasonally and calendar adjusted 0.2% in March, reversing a 0.5% rise in the previous month. UK construction output increased for the first time since the start of the year in April, primarily because of a strong gain in residential work, survey data from IHS Markit showed on Thursday. The IHS Markit/CIPS UK Construction Purchasing Managers' Index, or PMI, climbed to 50.5 from 49.7 in March. A reading above 50 suggests growth in the sector.

Global Equities: Trend turned choppy for major global markets as traders tried to assess the latest Fed statement and eyed the upcoming US nonfarm payrolls data.

Indian Economy: India's manufacturing sector growth eased to an eight-month low in April as new business growth moderated. The Nikkei India Manufacturing Purchasing Managers' Index declined from 52.6 in March to 51.8 in April, reflecting weakest improvement in business conditions since August 2018. This is the 21th consecutive month that the manufacturing PMI remained above the 50-point mark. A print above 50 means expansion while a score below indicates contraction. April PMI data indicated that softer increase in new orders restricted growth of output, employment and business sentiment. Although remaining inside expansion territory, growth continued to soften and the fact that employment increased at the weakest pace for over a year suggests that producers are hardly gearing up for a rebound, noted the report.

Equity Markets: Local equity indices ended the volatile trading session with modest losses amid lack of any fresh triggers to support buying. The Sensex settled below the psychological 39,000 mark. IT shares declined. The Nifty 50 index fell 23.40 points or 0.20% to 11,724.75. The index hit high of 11,789.30 and low of 11,699.55 in intraday trade. Among secondary barometers, the BSE Mid-Cap index fell 0.61%. The BSE Small-Cap index fell 0.21%.

Corporate News: The National Company Law Appellate Tribunal (NCLAT) on May 2 allowed the banks to declare as non-performing assets the accounts of IL&FS and its group companies that have defaulted on payments. Tata Motors Commercial and Passenger Vehicles Business sales in the domestic market in April 2019 at 42,577 units witnessed a drop of 20%, as against 53,511 units sold in April 2018, as weak consumer sentiments continued. National Fertiliser net profit rose 19.5% to Rs 80.88 crore on 46.07% rise in total income to Rs 3102.25 crore in Q4 March 2019 over Q4 March 2018. Sunteck Realty net profit dropped 40.78% to Rs 24.18 crore on 7.84% fall in total income to Rs 67.25 crore in Q4 March 2019 over Q4 March 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(130.6)	153.8	153.8
MF(INR cr)	826.0	(258.9)	(258.9)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,457	36,457	35,078
F&O(INR cr)	2,214,496	2,214,496	1,238,489

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.4	14.4	13.0
NSE VIX	23.0	23.0	21.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,709	(0.2) %	(2.0) %	Energy	16,499	(0.0) %	(0.2) %
IT	16,404	(1.8) %	3.6 %	Pharma	9,291	(1.2) %	(0.9) %
Metals	3,086	(0.1) %	(0.5) %	Finance	12,584	0.2 %	0.7 %
Auto	8,334	(0.2) %	(1.0) %	PSU	3,056	0.0 %	(9.7) %
FMCG	30,091	(0.8) %	(0.3) %	Real Estate	259	0.1 %	(3.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vodafone I	16	4.9 %	(8.7) %	Biocon	558	(6.0) %	(10.0) %
Bandhan Ba	625	4.2 %	17.8 %	Motherson	140	(4.2) %	(8.7) %
Container	514	4.1 %	(3.3) %	Dabur Indi	382	(4.0) %	(4.7) %
Bajaj Hold	3,205	3.8 %	(4.4) %	Britannia	2,783	(3.9) %	(8.7) %
Yes Bank	174	3.4 %	(37.0) %	Zee Entert	418	(3.3) %	(3.1) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (MAR)	03-05-2019	01:30	AUD	-	0.191
Building Approvals (YoY) (MAR)	03-05-2019	01:30	AUD	-	(0.125)
SECO Consumer Confidence (APR)	03-05-2019	05:45	CHF	-	(4)
Consumer Price Index (MoM) (APR)	03-05-2019	06:30	CHF	-	0.005
Consumer Price Index (YoY) (APR)	03-05-2019	06:30	CHF	-	0.007
CPI Core (YoY) (APR)	03-05-2019	06:30	CHF	-	0.005
CPI EU Harmonized (MoM) (APR)	03-05-2019	06:30	CHF	-	0.003
CPI EU Harmonized (YoY) (APR)	03-05-2019	06:30	CHF	-	0.007
Euro-Zone Consumer Price Index Core (YoY) (APR A)	03-05-2019	09:00	EUR	-	0.008
Euro-Zone Consumer Price Index Estimate (YoY) (APR)	03-05-2019	09:00	EUR	-	0.014
Euro-Zone Producer Price Index (MoM) (MAR)	03-05-2019	09:00	EUR	-	0.001
Euro-Zone Producer Price Index (YoY) (MAR)	03-05-2019	09:00	EUR	-	0.03
Markit/CIPS UK Composite PMI (APR)	03-05-2019	08:30	GBP	-	50
Markit/CIPS UK Services PMI (APR)	03-05-2019	08:30	GBP	-	48.9
Official Reserves (Changes) (APR)	03-05-2019	08:30	GBP	-	-
Advance Goods Trade Balance (MAR)	03-05-2019	12:30	USD	-	-
Average Hourly Earnings (MoM) (APR)	03-05-2019	12:30	USD	-	0.001
Average Hourly Earnings (YoY) (APR)	03-05-2019	12:30	USD	-	0.032
Average Weekly Hours All Employees (APR)	03-05-2019	12:30	USD	-	34.5
Change in Manufact. Payrolls (APR)	03-05-2019	12:30	USD	-	-
Change in Non-farm Payrolls (APR)	03-05-2019	12:30	USD	-	-
Change in Private Payrolls (APR)	03-05-2019	12:30	USD	-	-
Labor Force Participation Rate (APR)	03-05-2019	12:30	USD	-	0.63
Retail Inventories (MoM) (MAR)	03-05-2019	12:30	USD	-	-
Two-Month Payroll Net Revision (APR)	03-05-2019	12:30	USD	-	-
Underemployment Rate (APR)	03-05-2019	12:30	USD	-	0.073
Unemployment Rate (APR)	03-05-2019	12:30	USD	-	0.038
Wholesale Inventories (MoM) (MAR P)	03-05-2019	12:30	USD	-	0.002
Markit US Composite PMI (APR P)	03-05-2019	12:45	USD	-	52.8



Markit US Services PMI (APR F)	03-05-2019	13:45	USD	-	52.9
ISM Non-Manufacturing/Services Composite (APR)	03-05-2019	14:00	USD	-	56.1
Fed's Evans Speaks at NABE International Forum in Stockholm	03-05-2019	14:15	USD	-	-
Fed's Clarida Speaks at Hoover Institute Policy Conference	03-05-2019	15:30	USD	-	-
Baker Hughes U.S. Rig Count (MAY 3)	03-05-2019	17:00	USD	-	991
Fed's Williams Speaks at Hoover Institute Policy Conference	03-05-2019	17:45	USD	-	-
Fed's Bowman Speaks at Hoover Institute Policy Conference	03-05-2019	19:00	USD	-	-
Fed's Bullard, Daly, Kaplan and Mester Speak at Hoover Event	03-05-2019	23:45	USD	-	-

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