



04 May.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,350	0.4 %	1.2 %
BSE SENSEX	29,895	(0.1) %	0.5 %
CNX BANK	22,506	0.9 %	4.4 %
CNX MIDCAP	18,194	0.4 %	5.0 %
CNX SMALLCAP	7,565	0.4 %	7.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,958	0.0 %	5.4 %
S&P 500	2,388	(0.1) %	5.8 %
FTSE 100	7,235	(0.2) %	0.8 %
HANG SENG	24,696	0.3 %	11.5 %
NIKKEI	19,446	0.7 %	(0.8) %
SHANGHAI COMPOSITE	3,135	(0.3) %	(0.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.15	(0.2) %	(4.9) %
EUR/USD	1.09	(0.2) %	2.8 %
GBP/USD	1.29	(0.2) %	4.7 %
USD/JPY	112.80	0.8 %	(2.7) %
USD/AUD	1.35	1.7 %	(1.4) %
USD/SGD	1.40	0.2 %	(2.3) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.3 %	(8.6) %
Gold(INR/10g)	28,563	(0.2) %	2.7 %
Gold Comex(USD/oz)	1,241	(1.3) %	7.2 %
SILVER(INR/1Kg)	38,716	(1.1) %	(0.5) %
Aluminium(USD/MT)	1,916	0.4 %	12.6 %
Copper(USD/MT)	5,637	(1.9) %	1.1 %

**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 %	(0.1) %

**Global Economy:** The Federal Reserve on Wednesday voted unanimously to leave its benchmark interest rate at 0.75% to 1%, but signalled another rate hike is imminent despite recent economic weakness. The Fed continues to project two more rate hikes in 2017, as the fundamentals underpinning the continued growth of consumption remain solid. Annual inflation is "running close" to the Fed's 2% objective, policy makers said, although core prices excluding volatile food and energy prices were "somewhat below" the target. Activity in the US service sector grew at a faster than expected rate in the month of April, the Institute for Supply Management revealed in a report on Wednesday. The ISM said its non-manufacturing index rose to 57.5 in April from 55.2 in March.

**Global Equities:** After spending much of the day in negative territory, the major US indices ended mixed following the Federal Reserve's monetary policy announcement.

**Indian Economy:** The Union Cabinet chaired by the Prime Minister Narendra Modi has approved the policy for providing preference to domestically manufactured iron & steel products on Government procurement. This policy seeks to accomplish the PM's vision of 'Make in India' with objective of nation building and encourage domestic manufacturing. The policy mandates to provide preference to Domestically Manufactured Iron & Steel Products (DM1&SP), in Government Procurement. The policy is applicable on all government tenders where price bid is yet to be opened,

**Equity Markets:** Key benchmark indices ended the lacklustre trading session with tiny losses as lower European stocks weighed on sentiment. The Sensex hit its lowest closing level in more than one-week. The Sensex settled below the psychological 30,000 mark after regaining that mark in initial trade. Indices traded in a narrow range around the flat line in a lacklustre session of trade. Shares of public sector banks gained while shares of private sector banks declined. Most metal stocks dropped. Realty and IT stocks gained.

**Corporate News:** ICICI Bank's net profit jumped 188.5% to Rs 2024.64 crore on 10.8% decline in total income to Rs 16585.76 crore in Q4 March 2017 over Q4 March 2016. Infosys will be watched. Infosys Finacle, part of EdgeVerve Systems, a wholly owned subsidiary of Infosys and The Commercial Bank, Qatar's first private bank, along with its subsidiary and associates (Group) announced the successful completion of a pilot on the first ever cloud-based blockchain network to process international remittances. Reliance Industries (RIL) will be in focus. Reliance Corporate IT Park (RCITPL) a subsidiary of RIL announced that it has signed a memorandum of understanding (MoU) with SAP SE to launch SARAL GST' solution for taxpayers in the GST regime. The offering will enable taxpayers to be GST compliant and smoothly access the Government's GST System, once GST is rolled out from 1 July 2017. SARAL GST will leverage the expertise of RCITPL as GST Suvidha Provider (GSP) and SAP as Application Service Provider (ASP). HDFC, Godrej Properties, Emami, Exide Industries, MRF, L&T Finance Holdings, Oberoi Realty and Wockhardt among others will declare their quarterly earnings today, 4 May 2017.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(51.9)	(51.9)	(20.9)
MF(INR cr)	803.6	489.5	489.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,509	29,773	30,336
F&O(INR cr)	367,133	365,877	509,572

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.6	10.4	12.9
NSE VIX	11.5	11.5	11.6

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	22,307	(0.2) %	3.5 %	Energy	12,213	(0.2) %	3.3 %
IT	10,131	1.2 %	(4.4) %	Pharma	9,982	(0.5) %	(5.0) %
Metals	2,951	(0.2) %	(5.0) %	Finance	9,088	(0.3) %	3.0 %
Auto	10,273	(0.2) %	3.5 %	PSU	3,691	1.0 %	4.7 %
FMCG	23,684	(0.3) %	0.2 %	Real Estate	260	1.5 %	18.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Cummins In	1,055	5.3 %	9.7 %	H P C L	530	(4.1) %	2.2 %
S A I L	61	3.6 %	(2.8) %	Torrent Ph	1,344	(3.3) %	(10.7) %
Emami	1,069	2.5 %	1.9 %	Dabur Indi	276	(3.2) %	(1.6) %
Bharti Inf	363	2.5 %	10.2 %	Lupin	1,265	(3.0) %	(11.8) %
Punjab Nat	175	2.5 %	16.6 %	Bharat Ele	179	(2.3) %	11.9 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (APR)	04-05-2017	23:30	AUD	-	51.2
HIA New Home Sales (MoM) (MAR)	04-05-2017	1:00	AUD	-	0.002
RBA Governor Lowe Speech	04-05-2017	3:10	AUD	-	-
Trade Balance (Australian dollar) (MAR)	04-05-2017	1:30	AUD	-	-
Bank of Canada Governor Stephen Poloz Speech in Mexico	04-05-2017	20:25	CAD	-	-
International Merchandise Trade (Canadian dollar) (MAR)	04-05-2017	12:30	CAD	-	-
SECO Consumer Confidence (APR)	04-05-2017	5:45	CHF	-	(3)
Caixin China PMI Composite (APR)	04-05-2017	1:45	CNY	-	52.1
Caixin China PMI Services (APR)	04-05-2017	1:45	CNY	-	52.2
ECB's Draghi Speaks in Lausanne, Switzerland	04-05-2017	15:30	EUR	-	-
ECB's Lautenschlaeger speaks in Frankfurt	04-05-2017	10:30	EUR	-	-
ECB's Mersch speaks in Luxembourg	04-05-2017	11:35	EUR	-	-
ECB's Praet speaks in Brussels	04-05-2017	11:00	EUR	-	-
Euro-Zone Retail Sales (MoM) (MAR)	04-05-2017	9:00	EUR	-	0.007
Euro-Zone Retail Sales (YoY) (MAR)	04-05-2017	9:00	EUR	-	0.018
Markit Eurozone Composite PMI (APR F)	04-05-2017	8:00	EUR	-	56.7
Markit Eurozone Services PMI (APR F)	04-05-2017	8:00	EUR	-	56.2
Markit France Composite PMI (APR F)	04-05-2017	7:50	EUR	-	57.4
Markit France Services PMI (APR F)	04-05-2017	7:50	EUR	-	57.7
Markit Germany Services PMI (APR F)	04-05-2017	7:55	EUR	-	54.7
Markit/ADACI Italy Composite PMI (APR)	04-05-2017	7:45	EUR	-	54.2
Markit/ADACI Italy Services PMI (APR)	04-05-2017	7:45	EUR	-	52.9
Markit/BME Germany Composite PMI (APR F)	04-05-2017	7:55	EUR	-	56.3
M4 Ex IOFCs 3M Annualised (MAR)	04-05-2017	8:30	GBP	-	0.04
M4 Money Supply (MoM) (MAR)	04-05-2017	8:30	GBP	-	(0.003)
M4 Money Supply (YoY) (MAR)	04-05-2017	8:30	GBP	-	0.057
Markit/CIPS UK Composite PMI (APR)	04-05-2017	8:30	GBP	-	54.9
Markit/CIPS UK Services PMI (APR)	04-05-2017	8:30	GBP	-	55
Markit/CIPS UK Services PMI (APR)	04-05-2017	8:30	GBP	-	55



Net Consumer Credit (MAR)	04-05-2017	8:30	GBP	-	-
Net Lending Sec. on Dwellings (MAR)	04-05-2017	8:30	GBP	-	-
New Car Registrations (YoY) (APR)	04-05-2017	8:00	GBP	-	0.084
Official Reserves (Changes) (APR)	04-05-2017	8:30	GBP	-	-
ANZ Commodity Price (APR)	04-05-2017	1:00	NZD	-	0.004
Cap Goods Orders Nondef Ex Air (MAR F)	04-05-2017	14:00	USD	-	0.002
Cap Goods Ship Nondef Ex Air (MAR F)	04-05-2017	14:00	USD	-	0.004
Challenger Job Cuts (YoY) (APR)	04-05-2017	11:30	USD	-	(0.02)
Continuing Claims (APR 22)	04-05-2017	12:30	USD	-	-
Durable Goods Orders (MAR F)	04-05-2017	14:00	USD	-	0.007
Durables Ex Transportation (MAR F)	04-05-2017	14:00	USD	-	(0.002)
EIA Natural Gas Storage Change (APR 28)	04-05-2017	14:30	USD	-	74
EIA Working Natural Gas Implied Flow (APR 28)	04-05-2017	14:30	USD	-	74
Factory Orders (MAR)	04-05-2017	14:00	USD	-	0.01
Factory Orders Ex Trans (MAR)	04-05-2017	14:00	USD	-	0.004
Initial Jobless Claims (APR 29)	04-05-2017	12:30	USD	-	-
Non-Farm Productivity (1Q P)	04-05-2017	12:30	USD	-	0.013
Trade Balance (MAR)	04-05-2017	12:30	USD	-	-
Unit Labor Costs (1Q P)	04-05-2017	12:30	USD	-	0.017

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