



04 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,644	(0.3) %	4.2 %
BSE SENSEX	35,103	(0.2) %	5.2 %
CNX BANK	25,630	0.1 %	5.4 %
CNX MIDCAP	19,799	0.1 %	3.7 %
CNX SMALLCAP	8,215	0.0 %	3.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,930	0.0 %	(3.6) %
S&P 500	2,630	(0.2) %	(2.5) %
FTSE 100	7,503	(0.5) %	(1.9) %
HANG SENG	30,313	(1.3) %	(0.7) %
NIKKEI	22,473	(0.2) %	(4.4) %
SHANGHAI COMPOSITE	3,101	0.6 %	(7.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	66.64	(0.0) %	4.7 %
EUR/USD	1.20	0.2 %	(0.1) %
GBP/USD	1.36	(0.0) %	0.5 %
USD/JPY	109.06	(0.6) %	(3.3) %
USD/AUD	1.32	(0.5) %	3.5 %
USD/SGD	1.33	(0.4) %	(0.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(6.7) %	13.4 %
Gold(INR/10g)	30,905	(0.0) %	5.3 %
Gold Comex(USD/oz)	1,314	0.3 %	0.4 %
SILVER(INR/1Kg)	38,963	0.5 %	0.9 %
Aluminium(USD/MT)	2,349	3.5 %	4.1 %
Copper(USD/MT)	6,837	0.8 %	(4.8) %

FIXED INCOME

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

Global Economy: Partly reflecting a slowdown in the pace of job growth in the service sector, the Institute for Supply Management released a report on Thursday showing a bigger than expected decrease by its index of activity in the sector. The ISM said its non-manufacturing index fell to 56.8 in April from 58.8 in March. A report released by the Commerce Department showed a bigger than expected increase in new orders for US manufactured goods in the month of March. The report said factory orders surged up by 1.6% in March, matching the upwardly revised jump seen in February.

Global Equities: US stocks saw volatile moves and witnessed an initial sell off on Uncertainty about the outcome of highly anticipated trade talks between the US and China.

Indian Economy: The water storage available in 91 major reservoirs of the country for the week ending on May 03, 2018 was 35.219 BCM which is 22% of total storage capacity of these reservoirs. This percentage was at 23 for the week ending on April 26, 2018. The level of water storage in the week ending on May 03, 2018 was 85% of the storage of corresponding period of last year and 90% of storage of average of last ten years. The total storage capacity of these 91 reservoirs is 161.993 BCM which is about 63% of the total storage capacity of 257.812 BCM which is estimated to have been created in the country.

Equity Markets: Local stocks witnessed some losses, dragged by IT stocks, while negative global stocks amid caution about the China-US trade talks also weighed on investor sentiment. The barometer index, the S&P BSE Sensex, fell 73.28 points or 0.21% to settle at 35,103.14. The Nifty 50 index fell 38.40 points or 0.36% to settle at 10,679.65. Overseas, European equities were trading lower as investors closely monitored trade talks between the US and China and digested new earnings reports. Asian stocks fell after the Federal Reserve reiterated plans to continue raising rates gradually amid firming inflation.

Corporate News: Tata Motors (TML) announced after trading hours yesterday, 3 May 2018 that its board approved the sale of its defense business to group entity Tata Advanced Systems (TASL). This will not include the pure civilian vehicles which will continue to be with TML. TML will receive an upfront consideration of Rs 100 crore, adjusted for capex incurred and changes in working capital in the intervening period until closure date, and a deferred consideration of 3% of the revenue generated from identified specialized defence projects for upto 15 years from FY 2020 subject to a maximum of Rs 1750 crore. Two-wheeler major Hero MotoCorp said its total vehicles sales rose 16.50% to 6.94 lakh units in April 2018 over April 2017. With the forecast of a normal monsoon this year and a strong pipeline of new products coming up, Hero MotoCorp is confident of sustaining its growth momentum in the coming months. Vedanta's net profit rose 34.29% to Rs 5675 crore on 22.74% increase in net sales to Rs 27630 crore in Q4 March 2018 over Q4 March 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(52.0)	(52.0)	(47.0)
MF(INR cr)	642.0	488.9	488.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,407	36,974	34,218
F&O(INR cr)	1,181,312	930,859	760,085

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.9	15.8	18.0
NSE VIX	13.0	12.9	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,605	0.1 %	5.2 %	Energy	13,710	(0.5) %	3.1 %
IT	13,474	(2.0) %	6.0 %	Pharma	8,966	0.1 %	4.0 %
Metals	3,673	0.8 %	3.8 %	Finance	10,744	0.2 %	4.7 %
Auto	11,452	(0.5) %	3.6 %	PSU	2,794	0.1 %	(2.1) %
FMCG	28,486	(1.2) %	7.5 %	Real Estate	311	(1.7) %	4.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun Pharma	536	4.0 %	5.5 %	Interglobe	1,206	(10.2) %	(9.2) %
Oil India	230	3.6 %	1.2 %	HCL Techno	926	(7.5) %	(5.5) %
Bharti Inf	325	3.6 %	(3.8) %	Siemens	1,060	(6.1) %	(3.8) %
Container	1,359	2.4 %	9.5 %	Idea Cellu	64	(4.9) %	(17.8) %
NTPC	174	2.3 %	2.3 %	UPL	708	(3.5) %	(5.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Statement on Monetary Policy	04-05-2018	01:30	AUD	-	-
Ivey Purchasing Managers Index s.a. (APR)	04-05-2018	14:00	CAD	-	59.8
Caixin China PMI Composite (APR)	04-05-2018	01:45	CNY	-	51.8
Caixin China PMI Services (APR)	04-05-2018	01:45	CNY	-	52.3
Markit/ADACI Italy Composite PMI (APR)	04-05-2018	07:45	EUR	-	53.5
Markit/ADACI Italy Services PMI (APR)	04-05-2018	07:45	EUR	-	52.6
Markit France Composite PMI (APR F)	04-05-2018	07:50	EUR	-	56.9
Markit France Services PMI (APR F)	04-05-2018	07:50	EUR	-	57.4
Markit Germany Services PMI (APR F)	04-05-2018	07:55	EUR	-	54.1
Markit/BME Germany Composite PMI (APR F)	04-05-2018	07:55	EUR	-	55.3
Markit Eurozone Composite PMI (APR F)	04-05-2018	08:00	EUR	-	55.2
Markit Eurozone Services PMI (APR F)	04-05-2018	08:00	EUR	-	55
Euro-Zone Retail Sales (MoM) (MAR)	04-05-2018	09:00	EUR	-	0.001
Euro-Zone Retail Sales (YoY) (MAR)	04-05-2018	09:00	EUR	-	0.018
New Car Registrations (YoY) (APR)	04-05-2018	08:00	GBP	-	(0.157)
Average Hourly Earnings (MoM) (APR)	04-05-2018	12:30	USD	-	0.003
Average Hourly Earnings (YoY) (APR)	04-05-2018	12:30	USD	-	0.027
Average Weekly Hours All Employees (APR)	04-05-2018	12:30	USD	-	34.5
Change in Manufact. Payrolls (APR)	04-05-2018	12:30	USD	-	-
Change in Non-farm Payrolls (APR)	04-05-2018	12:30	USD	-	-
Change in Private Payrolls (APR)	04-05-2018	12:30	USD	-	-
Labor Force Participation Rate (APR)	04-05-2018	12:30	USD	-	0.629
Two-Month Payroll Net Revision (APR)	04-05-2018	12:30	USD	-	-
Underemployment Rate (APR)	04-05-2018	12:30	USD	-	0.08
Unemployment Rate (APR)	04-05-2018	12:30	USD	-	0.041
Fed's Dudley Speaks with Bloomberg's Matthew Winkler	04-05-2018	16:00	USD	-	-
Baker Hughes U.S. Rig Count (MAY 4)	04-05-2018	17:00	USD	-	1021
Quarles Speaks on Liquidity Regulation and Fed's Balance Sheet	04-05-2018	21:30	USD	-	-



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