



04 Jun.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,711	0.1 %	4.9 %
BSE SENSEX	35,227	(0.3) %	6.0 %
CNX BANK	26,660	(0.1) %	9.6 %
CNX MIDCAP	18,619	(0.1) %	(2.5) %
CNX SMALLCAP	7,643	(0.7) %	(3.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,635	0.9 %	(0.8) %
S&P 500	2,735	1.1 %	1.4 %
FTSE 100	7,702	0.3 %	0.7 %
HANG SENG	30,493	0.1 %	(0.1) %
NIKKEI	22,171	(0.1) %	(5.7) %
SHANGHAI COMPOSITE	3,075	(0.7) %	(8.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	67.06	(0.5) %	5.3 %
EUR/USD	1.17	(0.3) %	(2.9) %
GBP/USD	1.33	0.5 %	(1.2) %
USD/JPY	109.54	0.4 %	(2.8) %
USD/AUD	1.32	(0.0) %	3.3 %
USD/SGD	1.34	0.1 %	0.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(1.8) %	9.0 %
Gold(INR/10g)	30,764	(0.8) %	4.8 %
Gold Comex(USD/oz)	1,298	(0.4) %	(0.8) %
SILVER(INR/1Kg)	39,246	(1.4) %	1.7 %
Aluminium(USD/MT)	2,271	(0.6) %	0.7 %
Copper(USD/MT)	6,814	(0.2) %	(5.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

**Global Economy:** In a key data, the employment in the US jumped by much more than anticipated in the month of May, according to a report released by the Labor Department on Friday. The Labor Department said non-farm payroll employment surged up by 223,000 jobs in May after climbing by a downwardly revised 159,000 jobs in April. The manufacturing activity in the US accelerated by more than expected in the month of May. The ISM said its purchasing managers index or PMI climbed to 58.7 in May from 57.3 in April. Eurozone manufacturing sector showed further signs of cooling in May, as initially estimated, as the factory PMI fell to a 15-month low of 55.5 from 56.2 in April, final data from IHS Markit showed. China's Caixin PMI remained unchanged at 51.1 in May, survey data from IHS Markit showed. Operating conditions have strengthened in each month for the past year.

**Global Equities:** Upbeat economic data boosted the mood for US stocks and good gains emerged for the markets. The tech heavy Nasdaq surged near two month high.

**India Economy:** India Nikkei manufacturing Purchasing Managers' Index, or PMI, fell to 51.2 in May from 51.6 in April, survey data from IHS Markit showed Friday. However, any reading above 50 indicates expansion in the sector. Among components, output, new orders and employment all increased at slower rates in May. Meanwhile, new export orders grew at the strongest pace in three months amid reports of greater demand from international markets. On the price front, inflationary pressures intensified with both input and output prices rising at the fastest pace since February.

**Equity Markets:** Local indices logged modest losses on last trading day of the week weighed by data showing manufacturing PMI growth has slowed in May. Auto stocks gained after declaring good sales volume data for May 2018. Power generation stocks fell. Intraday volatility was high. Stocks nudged higher in early trade following good GDP data announced by the government on Thursday.

**Corporate News:** Alembic Pharmaceuticals has earmarked a capital expenditure of Rs 720 crore for this fiscal year to complete existing projects and on maintenance- according to media reports. Foreign investors have pulled out a massive Rs 29,714 crore from the capital markets in May, making it the biggest outflow in 18 months. This comes following an outflow of Rs 15,561 crore from the capital markets (equity and debt) in April. State Bank of India (SBI), the country's largest public sector lender, has increased interest rates on its term deposit rates for tenors between 1 year and 2 years by 25 basis points (bps). It also increased rates on its 2 year to 3 year fixed deposits (FDs) by 5 bps. India's export of finished steel slumped by 25.2 per cent to 0.558 million tonnes (MT) during April 2018, according to a report. Ashok Leyland reported 51% spurt in total sales at 13,659 units in May.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(76.4)	(64.9)	(56.0)
MF(INR cr)	365.4	587.5	543.7

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,890	32,890	34,590
F&O(INR cr)	512,567	512,567	806,247

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.5	13.5	16.1
NSE VIX	13.6	13.6	13.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,693	(1.0) %	9.7 %	Energy	13,498	(0.2) %	1.6 %
IT	13,559	(0.8) %	6.7 %	Pharma	8,213	(0.1) %	(4.7) %
Metals	3,568	(0.7) %	0.8 %	Finance	11,058	(0.7) %	7.8 %
Auto	11,077	0.7 %	0.2 %	PSU	2,938	(1.0) %	2.9 %
FMCG	28,611	(0.7) %	8.0 %	Real Estate	291	(1.3) %	(1.7) %

### 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>
Bajaj Auto	2,897	5.3 %	3.1 %	S A I L	72	(4.9) %	(1.1) %
Maruti Suz	8,809	3.2 %	(2.2) %	B H E L	80	(3.9) %	(2.5) %
Tata Motor	174	2.8 %	(8.4) %	Aurobindo	535	(3.8) %	(9.7) %
Piramal En	2,438	2.8 %	(1.3) %	Interglobe	1,177	(3.5) %	(11.4) %
Bharti Air	384	2.7 %	(2.9) %	L&T Fin.Ho	164	(3.4) %	2.3 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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