



04 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,089	0.0 %	3.6 %
BSE SENSEX	40,268	1.4 %	3.7 %
CNX BANK	31,654	0.0 %	4.4 %
CNX MIDCAP	18,132	0.0 %	(1.1) %
CNX SMALLCAP	6,567	0.0 %	(2.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,820	0.0 %	6.4 %
S&P 500	2,744	(0.3) %	9.5 %
FTSE 100	7,185	0.3 %	6.7 %
HANG SENG	26,894	(0.0) %	7.0 %
NIKKEI	20,411	(0.9) %	4.3 %
SHANGHAI COMPOSITE	2,890	(0.3) %	17.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.17	(0.8) %	(0.4) %
EUR/USD	1.12	0.5 %	(2.2) %
GBP/USD	1.26	0.0 %	(0.8) %
USD/JPY	108.21	(1.1) %	(1.3) %
USD/AUD	1.44	(0.6) %	1.1 %
USD/SGD	1.37	(0.9) %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	(5.5) %	15.0 %
Gold(INR/10g)	32,206	0.5 %	2.1 %
Gold Comex(USD/oz)	1,306	1.2 %	1.2 %
SILVER(INR/1Kg)	36,494	0.4 %	(4.6) %
Aluminium(USD/MT)	1,761	(0.1) %	(5.2) %
Copper(USD/MT)	5,781	(0.7) %	(1.0) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	(0.1) %	(0.5) %

Global Economy: The ISM said its US purchasing managers index (PMI) edged down to 52.1 in May from 52.8 in April, dropping to its lowest level since hitting 51.7 in October of 2016. The Caixin/Markit China manufacturing PMI for May was 50.2, witnessing a flat performance over month. PMI readings above 50 indicate expansion, while those below that signal contraction. Growth of new orders grew in May and the rate of new business growth improved slightly in the last month, Caixin said in a statement on Monday. However, the survey noted that business confidence slipped to the lowest level since the survey series began in April 2012. Eurozone manufacturing sector continued to remain in contraction mode in May, final survey data from IHS Markit showed Monday. The factory Purchasing Managers' Index came in at 47.7 in May, down from 47.9 in the previous month. A score below 50 indicates contraction and the latest data shows that sector has shrunk over the last four successive months. UK manufacturing sector contracted for the first time since July 2016 in the month of May, survey results from IHS Markit showed Monday. The headline IHS Markit/ Chartered Institute of Procurement & Supply Purchasing Managers' Index declined more-than-expected to 49.4 in May from 53.1 in April.

Global Equities: Weak economic data weighs on the sentiment. Market mood remains generally lax on the US-China trade dispute and the US decision to impose tariffs on Mexican goods.

Indian Economy: India's headline Nikkei/IHS Markit manufacturing Purchasing Managers' Index rose to 52.7 in May from 51.8 in April, survey data from IHS Markit showed on Monday. A score above 50 indicates expansion in the sector. Factory orders were rising for the nineteen months and the pace of growth improved from April. Exports rose at the fastest pace in six months. Manufacturing output grew the most in three months on rising new client wins, sales and improved technology. As new works increased, factories added more employees, leading to the fastest growth in employment since February. The All-India CPI-IW for April, 2019 increased by 3 points and pegged at 312 (three hundred and twelve). On 1-month percentage change, it increased by (+) 0.97% between March, 2019 and April, 2019 when compared with the increase of (+) 0.35% between the corresponding months of previous year.

Equity Markets: Strong buying in index pivotals triggered a sharp rally on the bourses Monday. Sentiment was boosted by steep slide in crude oil prices. India imports majority of its crude requirements and a decline in crude eases concerns on fiscal deficit, inflation and gives more room for the government to boost growth through spending on infrastructure.

Corporate News: Dr. Reddy's Laboratories announced the relaunch of Zenatane (Isotretinoin Capsules, USP), 10 mg, 20 mg, 30 mg and 40 mg a therapeutic equivalent generic version of Accutane, approved by the US Food and Drug Administration (USFDA). The product is being launched with an approved Risk Evaluation and Mitigation Strategy (REMS) Program. GE Power India has been awarded a contract worth Rs 738.3 crore by Aravali Power Company (a Joint venture company of NTPC, Haryana Power Generation Company and Indraprastha Power Generation Company) for Design, Engineering, Civil Work, Supply, Erection and Commissioning of Wet FGD systems along with auxiliaries like Limestone and Gypsum Handling System and Wet Stack on full turnkey basis. L&T Technology Services said that its promoter, Larsen & Toubro (L&T), plans to sell upto 3.88% stake in L&T Technology Services through offer for sale (OFS). The offer shall take place over two trading days on 4 June 2019 and 6 June 2019. L&T will sell up to 40.34 lakh shares at a floor price of Rs 1,650 each.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	142.4	64.7	106.0
MF(INR cr)	516.2	235.9	14.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,465	37,465	35,397
F&O(INR cr)	1,716,927	1,716,927	1,186,159

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.7	16.8	14.9
NSE VIX	16.0	16.0	22.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,654	0.9 %	4.4 %	Energy	16,760	1.2 %	1.4 %
IT	16,361	1.2 %	3.3 %	Pharma	8,537	1.0 %	(8.9) %
Metals	2,951	1.8 %	(4.9) %	Finance	13,636	1.2 %	9.1 %
Auto	8,328	1.9 %	(1.0) %	PSU	3,266	0.6 %	(3.5) %
FMCG	30,279	1.4 %	0.3 %	Real Estate	287	1.0 %	7.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Page Indus	21,102	6.8 %	(17.4) %	Aurobindo	657	(2.3) %	(17.1) %
Hero Motoc	2,840	6.0 %	11.0 %	Bosch	17,405	(1.8) %	(3.9) %
ICICI Lomb	1,221	3.7 %	20.2 %	Motherson	114	(1.4) %	(26.0) %
Bajaj Auto	3,035	3.7 %	4.1 %	Bank of Ba	132	(1.3) %	(0.9) %
Asian Pain	1,459	3.7 %	(2.2) %	GAIL (Indi	357	(1.0) %	0.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Current Account Balance (Australian Dollar) (1Q)	04-06-2019	1:30	AUD	-	-
Net Exports of Gross Domestic Product (1Q)	04-06-2019	1:30	AUD	-	(0.2)
Retail Sales (MoM) (APR)	04-06-2019	1:30	AUD	-	0.003
AiG Performance of Service Index (MAY)	04-06-2019	22:30	AUD	-	46.5
CBA Australia PMI Composite (MAY F)	04-06-2019	23:00	AUD	-	52.2
CBA Australia PMI Services (MAY F)	04-06-2019	23:00	AUD	-	52.3
RBA Cash Rate Target (JUN 4)	04-06-2019	4:30	AUD	-	0.015
Euro-Zone Consumer Price Index Core (YoY) (MAY A)	04-06-2019	9:00	EUR	-	0.013
Euro-Zone Consumer Price Index Estimate (YoY) (MAY)	04-06-2019	9:00	EUR	-	0.017
Euro-Zone Unemployment Rate (APR)	04-06-2019	9:00	EUR	-	0.077
Markit/CIPS UK Construction PMI (MAY)	04-06-2019	8:30	GBP	-	50.5
Consumer Confidence Index (MAY)	04-06-2019	13:00	MXN	-	110.9
Fed's Williams Speaks at Conference on Reforming Bank Culture	04-06-2019	12:30	USD	-	-
Powell Discusses Policy Strategy at Chicago Fed Conference	04-06-2019	13:55	USD	-	-
Cap Goods Orders Nondef Ex Air (APR F)	04-06-2019	14:00	USD	-	(0.009)
Cap Goods Ship Nondef Ex Air (APR F)	04-06-2019	14:00	USD	-	0
Durable Goods Orders (APR F)	04-06-2019	14:00	USD	-	(0.021)
Durables Ex Transportation (APR F)	04-06-2019	14:00	USD	-	0
Factory Orders (APR)	04-06-2019	14:00	USD	-	0.019
Factory Orders Ex Trans (APR)	04-06-2019	14:00	USD	-	0.008
Fed's Brainard Moderates Panel at Chicago Fed Conference	04-06-2019	19:45	USD	-	-

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