



05 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,247	1.2 %	0.3 %
BSE SENSEX	33,019	(1.1) %	0.5 %
CNX BANK	24,433	1.3 %	0.4 %
CNX MIDCAP	19,324	1.5 %	1.2 %
CNX SMALLCAP	8,080	1.7 %	1.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,264	1.0 %	(2.3) %
S&P 500	2,645	1.2 %	(1.9) %
FTSE 100	7,034	0.1 %	(8.0) %
HANG SENG	29,519	(2.2) %	(3.3) %
NIKKEI	21,320	0.1 %	(9.3) %
SHANGHAI COMPOSITE	3,131	(0.2) %	(6.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.15	(0.1) %	2.3 %
EUR/USD	1.23	(0.3) %	2.3 %
GBP/USD	1.41	0.1 %	4.2 %
USD/JPY	106.89	1.0 %	(5.2) %
USD/AUD	1.30	(0.7) %	1.5 %
USD/SGD	1.31	0.0 %	(1.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(3.0) %	4.4 %
Gold(INR/10g)	30,844	0.5 %	5.1 %
Gold Comex(USD/oz)	1,338	0.8 %	2.2 %
SILVER(INR/1Kg)	38,305	(0.0) %	(0.8) %
Aluminium(USD/MT)	2,010	0.7 %	(10.9) %
Copper(USD/MT)	6,756	1.1 %	(5.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.3 %

Global Economy: After reporting a notable pullback in new orders for U.S. manufactured goods in the previous month, the Commerce Department released a report on Wednesday showing a rebound in factory orders in the month of February. The Commerce Department said factory orders jumped by 1.2% in February. Eurozone inflation accelerated in March while the unemployment rate declined to a more than nine-year low in February. Inflation rose to 1.4% in March from 1.1% in February, flash data from Eurostat showed Wednesday. Inflation continues to stay below the ECB's target of 'below, but close to 2%'. However, core inflation that excludes the volatile prices of energy, food, alcohol and tobacco, held steady at 1% in March. The unemployment rate in the currency bloc declined to 8.5% in February from 8.6% in January. UK construction activity contracted in March following five months of marginal growth, survey data from IHS Markit showed Wednesday. The IHS Markit/Chartered Institute of Procurement & Supply construction Purchasing Managers' Index fell to 47.0 in March from 51.4 in February.

Global Equities: The DOW moved up sharply in intraday moves and added around 1% despite global trade warfare.

Indian Economy: The Monsoon 2018 is likely to be 'normal' with zero chance of a drought according to private forecaster, Skymet, noted media reports. Monsoon in the year 2018 is likely to remain normal at 100 per cent (with an error margin of +/-5%) of the long period average (LPA) of 887 mm for the four-month period from June to September, the organisation said in a latest statement. Normal rainfall refers to India getting, within a 4% error margin during the monsoon season.

Equity Markets: Local stocks declined sharply in last session, mirroring weak global stocks, amid escalating trade war between China and the US. The Sensex settled a tad above the psychological 33,000 mark after falling below that level in intraday trade. Shares in Europe and Asia dropped after China today, 4 April 2018 announced additional tariffs on \$50 billion of US goods. China will impose additional tariffs of 25% on 106 US goods including soybeans, autos, chemicals, some types of aircraft and corn products, among other agricultural goods.

Corporate News: Banking stocks would be in focus as traders' eye the Reserve Bank of India's (RBI) two day monetary policy meeting. The RBI's two-day Monetary Policy Committee (MPC) meeting began yesterday April 2018 for the first bi-monthly monetary policy for 2018-2019. Government has approved special package for employment generation in leather and footwear sector. The package involves implementation of Central Sector Scheme 'Indian Footwear, Leather & Accessories Development Programme (IFLADP)' with an approved expenditure of Rs. 2,600 crores over the three financial years from 2017-18 to 2019-20. Key risks to the retail inflation include higher Minimum Support Prices (MSP) for agricultural items, populist spending in the run-up to the 2019 general elections and strengthening of global crude oil prices, the ASSOCHAM has said in its pre-credit policy review letter to the Reserve Bank of India (RBI). India Ratings and Research (Ind-Ra) has revised its FY19 economic growth forecast to 7.4% from 7.1% earlier. From the production side, higher growth in agriculture (expectation of normal rainfall and assumption of even rainfall distribution over space and time) and industrial sectors is expected to push the overall economic growth. From the expenditure side, the boost is expected to come from both private and government expenditure coupled with green shoots emerging in investment spending.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(73.1)	(56.4)	(56.4)
MF(INR cr)	2,235.4	395.4	565.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,314	32,908	32,908
F&O(INR cr)	895,607	569,334	569,334

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.1	22.4	22.4
NSE VIX	16.3	15.6	15.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,130	(1.6) %	(0.8) %	Energy	13,254	(1.1) %	(0.3) %
IT	12,491	(1.0) %	(1.7) %	Pharma	8,570	(1.1) %	(0.6) %
Metals	3,468	(2.6) %	(2.0) %	Finance	10,169	(1.4) %	(0.9) %
Auto	11,198	0.4 %	1.3 %	PSU	2,852	(1.7) %	(0.1) %
FMCG	26,448	(0.2) %	(0.2) %	Real Estate	294	(1.3) %	(0.8) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	356	3.6 %	4.9 %	UPL	733	(4.3) %	(2.6) %
Eicher Mot	28,934	3.4 %	2.3 %	Bank of Ba	140	(3.7) %	(1.4) %
Bosch	19,685	3.3 %	6.3 %	Sun TV Net	861	(3.7) %	0.1 %
Tata Motor	199	2.7 %	5.1 %	S A I L	72	(3.5) %	(1.0) %
P & G Hygi	9,611	1.5 %	2.3 %	Hindalco I	201	(3.4) %	(4.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Trade Balance (FEB)	05-04-2018	1:30	AUD	-	-
International Merchandise Trade (Canadian dollar) (FEB)	05-04-2018	12:30	CAD	-	-
Consumer Price Index (MoM) (MAR)	05-04-2018	7:15	CHF	-	0.004
Consumer Price Index (YoY) (MAR)	05-04-2018	7:15	CHF	-	0.006
Consumer Price Index EU Harmonized (MoM) (MAR)	05-04-2018	7:15	CHF	-	0.003
Consumer Price Index EU Harmonized (YoY) (MAR)	05-04-2018	7:15	CHF	-	0.005
SNB's Maechler, Dewet Moser Speak in Zurich	05-04-2018	16:00	CHF	-	-
Euro-Zone Producer Price Index (MoM) (FEB)	05-04-2018	9:00	EUR	-	0.004
Euro-Zone Producer Price Index (YoY) (FEB)	05-04-2018	9:00	EUR	-	0.015
Euro-Zone Retail Sales (MoM) (FEB)	05-04-2018	9:00	EUR	-	(0.001)
Euro-Zone Retail Sales (YoY) (FEB)	05-04-2018	9:00	EUR	-	0.023
German Factory Orders (MoM) (FEB)	05-04-2018	6:00	EUR	-	(0.039)
German Factory Orders n.s.a. (YoY) (FEB)	05-04-2018	6:00	EUR	-	0.082
Markit Eurozone Composite PMI (MAR F)	05-04-2018	8:00	EUR	-	55.3
Markit Eurozone Services PMI (MAR F)	05-04-2018	8:00	EUR	-	55
Markit France Composite PMI (MAR F)	05-04-2018	7:50	EUR	-	56.2
Markit France Services PMI (MAR F)	05-04-2018	7:50	EUR	-	56.8
Markit Germany Services PMI (MAR F)	05-04-2018	7:55	EUR	-	54.2
Markit/ADACI Italy Composite PMI (MAR)	05-04-2018	7:45	EUR	-	56
Markit/ADACI Italy Services PMI (MAR)	05-04-2018	7:45	EUR	-	55
Markit/BME Germany Composite PMI (MAR F)	05-04-2018	7:55	EUR	-	55.4
Markit/CIPS UK Composite PMI (MAR)	05-04-2018	8:30	GBP	-	54.5
Markit/CIPS UK Services PMI (MAR)	05-04-2018	8:30	GBP	-	54.5
New Car Registrations (YoY) (MAR)	05-04-2018	8:00	GBP	-	(0.028)
Official Reserves (Changes) (MAR)	05-04-2018	8:30	GBP	-	-
Overall Household Spending (YoY) (FEB)	05-04-2018	23:30	JPY	-	0.02
ANZ Commodity Price (MAR)	05-04-2018	1:00	NZD	-	0.028
Challenger Job Cuts (YoY) (MAR)	05-04-2018	11:30	USD	-	(0.043)
Continuing Claims (MAR 2018)	05-04-2018	13:30	USD	-	-



EIA Natural Gas Storage Change (MAR 30)	05-04-2018	14:30	USD	-	(63)
EIA Working Natural Gas Implied Flow (MAR 30)	05-04-2018	14:30	USD	-	(63)
Fed's Bostic Speaks on Financial Literacy	05-04-2018	17:00	USD	-	-
Initial Jobless Claims (MAR 31)	05-04-2018	12:30	USD	-	-
Trade Balance (FEB)	05-04-2018	12:30	USD	-	-

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