



05 May.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,320	(0.4) %	0.9 %
BSE SENSEX	30,126	0.8 %	0.2 %
CNX BANK	22,726	0.0 %	5.5 %
CNX MIDCAP	18,187	(0.2) %	4.9 %
CNX SMALLCAP	7,548	(0.3) %	6.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,951	(0.0) %	5.4 %
S&P 500	2,390	0.1 %	5.8 %
FTSE 100	7,248	0.2 %	1.0 %
HANG SENG	24,684	(0.1) %	11.4 %
NIKKEI	19,446	0.7 %	(0.8) %
SHANGHAI COMPOSITE	3,127	(0.3) %	(0.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.17	0.0 %	(4.8) %
EUR/USD	1.10	0.8 %	3.5 %
GBP/USD	1.29	0.3 %	5.0 %
USD/JPY	112.61	(0.2) %	(2.9) %
USD/AUD	1.35	0.2 %	(1.1) %
USD/SGD	1.40	0.3 %	(2.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	(4.8) %	(13.0) %
Gold(INR/10g)	28,184	(1.3) %	1.3 %
Gold Comex(USD/oz)	1,228	(1.0) %	6.2 %
SILVER(INR/1Kg)	38,076	(1.7) %	(2.2) %
Aluminium(USD/MT)	1,910	(0.3) %	12.2 %
Copper(USD/MT)	5,543	(1.7) %	(0.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	0.0 %	(0.1) %

Global Economy: New orders for US manufactured goods saw a modest increase in the month of March, according to a report released by the Commerce Department on Thursday. The Commerce Department said factory orders crept up by 0.2% in March after surging up by a revised 1.2% in February. A report released by the Labor Department on Thursday showed an unexpected drop in US labor productivity in the first quarter along with a bigger than expected jump in unit labor costs. The Labor Department said productivity fell by 0.6% in the first quarter. The Eurozone private sector expanded at the fastest pace in six years in April, survey data from IHS Markit showed. The final composite output index rose to 56.8 in April from 56.4 in March. This was slightly higher than the flash estimate of 56.7.

Global Equities: Markets are eyeing the US Nonfarm payrolls data due to be released today. US stocks showed a lack of direction throughout the trading day on Thursday, extending recent choppy trades.

Indian Economy: Indian service sector activity continued to expand during April, supported by ongoing growth of new work, and companies hired additional staff over the month. However, in all three cases, the rates of increase weakened. On the price front, average input cost inflation slowed from March's nine-month high amid reports of lower fuel prices partly offsetting higher transport costs arising from lorry strikes. Conversely, the rate of charge inflation accelerated. The headline seasonally adjusted Nikkei Services PMI Business Activity Index was down from 51.5 in March to 50.2 in April. Expansion has now been registered for three successive months, but the latest reading was the lowest in this period.

Equity Markets: Local indices registered modest gains buoyed by positive sentiment in European trading. The Sensex settled above the psychological 30,000 level. It had regained that mark in early trade after closing below that level during the previous trading session. The Sensex hit more than one-week closing high. The Nifty hit record closing high.

Corporate News: Emami's consolidated net profit rose 1.47% to Rs 83.32 crore on 4.4% decline in net total income from operations to Rs 577.72 crore in Q4 March 2017 over Q4 March 2016. Wockhardt reported consolidated net loss of Rs 174.72 crore in Q4 March 2017, higher than net loss of Rs 5.38 crore in Q4 March 2016. Total income fell 10.53% to Rs 919.82 crore in Q4 March 2017 over Q4 March 2016. Tata Communications' reported consolidated net loss of Rs 260.81 crore in Q4 March 2017, higher than net loss of Rs 256.95 crore in Q4 March 2016. Total income rose 7.64% to Rs 5116.48 crore in Q4 March 2017 over Q4 March 2016. Multi Commodity Exchange of India's (MCX) net profit dropped 50.78% to Rs 21.88 crore on 19.46% decline in total income to Rs 86.90 crore in Q4 March 2017 over Q4 March 2016. Oberoi Realty's consolidated net profit surged 50.29% to Rs 101.82 crore on 24.73% rise in total income to Rs 302 crore in Q4 March 2017 over Q4 March 2016. Wipro announced that it has joined Enterprise Ethereum Alliance (EEA) as a founding member.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(14.6)	(33.2)	(20.6)
MF(INR cr)	258.4	558.2	558.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,095	30,547	30,419
F&O(INR cr)	755,654	495,803	521,290

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.7	10.5	12.8
NSE VIX	11.3	11.4	11.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	22,720	1.9 %	5.4 %	Energy	12,140	(0.6) %	2.7 %
IT	10,107	(0.2) %	(4.6) %	Pharma	9,979	(0.0) %	(5.0) %
Metals	2,928	(0.8) %	(5.7) %	Finance	9,227	1.5 %	4.5 %
Auto	10,212	(0.6) %	2.9 %	PSU	3,818	3.4 %	8.3 %
FMCG	23,952	1.1 %	1.3 %	Real Estate	257	(0.9) %	17.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Bank	298	9.2 %	3.9 %	Vedanta	233	(3.2) %	(14.7) %
Emami	1,116	4.3 %	6.3 %	Glenmark P	859	(2.9) %	0.2 %
Grasim Ind	1,203	3.9 %	14.5 %	Hindalco I	192	(2.3) %	(0.6) %
Adani Port	339	3.7 %	(0.8) %	Tata Motor	437	(2.3) %	(7.2) %
Axis Bank	519	3.6 %	3.6 %	DLF	186	(2.0) %	26.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
HIA New Home Sales (MoM) (MAR)	05-05-2017	1:00	AUD	-	0.002
RBA Statement on Monetary Policy	05-05-2017	1:30	AUD	-	-
Full Time Employment Change (APR)	05-05-2017	12:30	CAD	-	18.4
Ivey Purchasing Managers Index SA (APR)	05-05-2017	14:00	CAD	-	61.1
Net Change in Employment (APR)	05-05-2017	12:30	CAD	-	-
Part Time Employment Change (APR)	05-05-2017	12:30	CAD	-	1
Participation Rate (APR)	05-05-2017	12:30	CAD	-	65.9
Unemployment Rate (APR)	05-05-2017	12:30	CAD	-	0.067
Foreign Currency Reserves (APR)	05-05-2017	7:00	CHF	-	-
UBS Real Estate Bubble Index (1Q)	05-05-2017	6:00	CHF	-	1.35
Markit Eurozone Retail PMI (APR)	05-05-2017	8:10	EUR	-	49.5
Markit France Retail PMI (APR)	05-05-2017	8:10	EUR	-	49.4
Markit Germany Construction PMI (APR)	05-05-2017	7:30	EUR	-	56.4
Markit Germany Retail PMI (APR)	05-05-2017	8:10	EUR	-	52.5
Markit Italy Retail PMI (APR)	05-05-2017	8:10	EUR	-	45.1
Reserve Bank of New Zealand 2-Year Inflation Expectation (2Q)	05-05-2017	3:00	NZD	-	0.019
Average Hourly Earnings (MoM) (APR)	05-05-2017	12:30	USD	-	0.002
Average Hourly Earnings (YoY) (APR)	05-05-2017	12:30	USD	-	0.027
Average Weekly Hours All Employees (APR)	05-05-2017	12:30	USD	-	34.3
Baker Hughes U.S. Rig Count (MAY 05)	05-05-2017	17:00	USD	-	870
Change in Manufacturing Payrolls (APR)	05-05-2017	12:30	USD	-	-
Change in Non-farm Payrolls (APR)	05-05-2017	12:30	USD	-	-
Change in Private Payrolls (APR)	05-05-2017	12:30	USD	-	-
Consumer Credit (MAR)	05-05-2017	19:00	USD	-	-
Fed's Charles Evans at Hoover's Monetary Policy Conference	05-05-2017	17:30	USD	-	-
Fed's Fischer Speaks at Hoover Event in Stanford	05-05-2017	15:30	USD	-	-
Fed's Rosengren, Evans and Bullard on Hoover Institution Panel	05-05-2017	17:30	USD	-	-
Fed's Rosengren, Evans Hoover Institution	05-05-2017	17:30	USD	-	-
Fed's Williams Speaks at Kenneth in New York	05-05-2017	16:45	USD	-	-



Fed's Yellen Speaks at Brown University	05-05-2017	17:30	USD	-	-
Labor Force Participation Rate (APR)	05-05-2017	12:30	USD	-	0.63
Two-Month Payroll Net Revision (APR)	05-05-2017	12:30	USD	-	-
Underemployment Rate (APR)	05-05-2017	12:30	USD	-	0.089
Unemployment Rate (APR)	05-05-2017	12:30	USD	-	0.045

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