



05 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,599	(0.3) %	3.8 %
BSE SENSEX	35,012	(0.6) %	5.1 %
CNX BANK	26,238	(0.1) %	7.9 %
CNX MIDCAP	18,411	(0.1) %	(3.6) %
CNX SMALLCAP	7,409	(1.0) %	(6.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,814	0.7 %	(0.0) %
S&P 500	2,747	0.5 %	1.9 %
FTSE 100	7,741	0.5 %	1.2 %
HANG SENG	30,998	1.7 %	1.6 %
NIKKEI	22,476	1.4 %	(4.4) %
SHANGHAI COMPOSITE	3,091	0.5 %	(7.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.11	(0.4) %	5.4 %
EUR/USD	1.17	(0.0) %	(2.6) %
GBP/USD	1.33	0.2 %	(1.5) %
USD/JPY	109.93	0.8 %	(2.5) %
USD/AUD	1.31	(1.1) %	2.3 %
USD/SGD	1.34	(0.2) %	0.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(1.6) %	7.3 %
Gold(INR/10g)	30,716	(0.2) %	4.6 %
Gold Comex(USD/oz)	1,296	(0.1) %	(1.0) %
SILVER(INR/1Kg)	39,298	0.1 %	1.8 %
Aluminium(USD/MT)	2,325	2.4 %	3.0 %
Copper(USD/MT)	6,935	1.8 %	(3.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.5 %

Global Economy: Eurozone investor confidence index slid to 9.3 in June from 19.2 in May, survey data from think tank Sentix showed Monday. This was the lowest score since October 2016. The current situation index declined to 34.5, the weakest since April 2017, from 42.8 a month ago. At the same time, the expectations index came in at -13.3, the lowest since August 2012, versus -2 in May. Investors still hope that the world's trade dispute with the US will not get out of hand, data showed. UK construction Purchasing Managers' Index held steady at 52.5 in May, survey data from IHS Markit and Chartered Institute of Procurement & Supply showed. The construction activity growth remained stable in May. A score above 50 indicates expansion.

Global Equities: World stocks edged higher as optimism for the world's largest economy helped investors put concerns over trade protectionism aside.

Indian Economy: Due to the ongoing farmers' protest, any disruption in supply of essential agri products including fruits, vegetables and milk, along with a high auto fuel prices, is bound to hit the common household budget, said the ASSOCHAM, making an appeal to the government to reach out to farmers. According to the chamber, the consumers of petrol and diesel and those suffering their cascading effect, want sizeable cut in the level of taxes on petrol and diesel, both at the Centre and state levels.

Equity Markets: Domestic stocks settled with modest losses on first trading day of the week led by slide in banking and realty stocks. The barometer index, the S&P BSE Sensex, fell 215.37 points or 0.61% to settle at 35,011.89. The Nifty 50 index fell 67.70 points or 0.63% to settle at 10,628.50. The Sensex settled a tad above the psychological 35,000 level after sliding below that level in late trade. Investors remained on the sidelines ahead of Reserve Bank of India's (RBI) monetary policy review meeting.

Corporate News: IT counters could be in focus following latest spurt in the Indian Rupee. The INR hit a fresh one-month high against the US dollar yesterday following recent slide in global crude oil futures. Investors are keenly for the outcome of the Reserve Bank of India's second bi-monthly monetary policy committee meeting for the financial year 2018-2019. Dilip Buildcon rose yesterday from a four month low after the company received letter of award from National Highways Authority of India for a new hybrid annuity project valued at Rs 1313.90 crore in Karnataka. Dilip Buildcon said that the order is for four laning of Bellary to Byrapura Section of NH-150A on Hybrid Annuity Mode under Bharatmala Pariyojana in Karnataka on Hybrid Annuity Mode Pkg - 1. The construction period of the project is 24 months. According to India Ratings and Research (Ind-Ra), domestic Coal supply shortages have widened. Due to muted generation from nuclear and hydro power, the dependence on thermal power remained high, says the agency.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	18.6	18.6	(54.3)
MF(INR cr)	365.4	587.5	543.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	5,359	19,125	33,926
F&O(INR cr)	643,117	577,842	802,622

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.7	13.1	16.0
NSE VIX	13.9	13.7	13.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,258	(1.6) %	7.9 %	Energy	13,511	0.1 %	1.7 %
IT	13,595	0.3 %	7.0 %	Pharma	8,206	(0.1) %	(4.8) %
Metals	3,574	0.2 %	1.0 %	Finance	10,881	(1.6) %	6.0 %
Auto	11,023	(0.5) %	(0.3) %	PSU	2,892	(1.6) %	1.3 %
FMCG	28,395	(0.8) %	7.1 %	Real Estate	282	(3.3) %	(5.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
SAIL	76	4.5 %	3.4 %	BHEL	75	(6.3) %	(8.7) %
Sun TV Net	921	3.8 %	7.0 %	Indiabulls	1,174	(4.8) %	(5.6) %
Dr Reddy's	1,996	2.8 %	(6.4) %	Bank of Ba	132	(3.9) %	(7.3) %
Idea Cellu	63	1.8 %	(19.2) %	DLF	199	(3.8) %	(0.9) %
Infosys	1,239	1.5 %	9.0 %	Siemens	993	(3.1) %	(9.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Current Account Balance (Australian Dollar) (1Q)	05-06-2018	1:30	AUD	-	-
Net Exports of Gross Domestic Product (1Q)	05-06-2018	1:30	AUD	-	(0.5)
RBA Cash Rate Target (JUN 05)	05-06-2018	4:30	AUD	-	0.015
Labor Productivity (QoQ) (1Q)	05-06-2018	12:30	CAD	-	0.002
Caixin China PMI Composite (MAY)	05-06-2018	1:45	CNY	-	52.3
Caixin China PMI Services (MAY)	05-06-2018	1:45	CNY	-	52.9
ECB's Draghi Speaks in Frankfurt	05-06-2018	13:00	EUR	-	-
Markit/ADACI Italy Composite PMI (MAY)	05-06-2018	7:45	EUR	-	52.9
Markit/ADACI Italy Services PMI (MAY)	05-06-2018	7:45	EUR	-	52.6
Markit France Composite PMI (MAY F)	05-06-2018	7:50	EUR	-	54.5
Markit France Services PMI (MAY F)	05-06-2018	7:50	EUR	-	54.3
Markit Germany Services PMI (MAY F)	05-06-2018	7:55	EUR	-	52.1
Markit/BME Germany Composite PMI (MAY F)	05-06-2018	7:55	EUR	-	53.1
Markit Eurozone Composite PMI (MAY F)	05-06-2018	8:00	EUR	-	54.1
Markit Eurozone Services PMI (MAY F)	05-06-2018	8:00	EUR	-	53.9
Euro-Zone Retail Sales (MoM) (APR)	05-06-2018	9:00	EUR	-	0.001
Euro-Zone Retail Sales (YoY) (APR)	05-06-2018	9:00	EUR	-	0.008
BOE's Cunliffe Speaks at Derivatives Conference, London	05-06-2018	10:00	GBP	-	-
New Car Registrations (YoY) (MAY)	05-06-2018	8:00	GBP	-	0.104
Markit/CIPS UK Composite PMI (MAY)	05-06-2018	8:30	GBP	-	53.2
Markit/CIPS UK Services PMI (MAY)	05-06-2018	8:30	GBP	-	52.8
Official Reserves (Changes) (MAY)	05-06-2018	8:30	GBP	-	-
Nikkei Japan PMI Composite (MAY)	05-06-2018	0:30	JPY	-	53.1
Nikkei Japan PMI Services (MAY)	05-06-2018	0:30	JPY	-	52.5
ANZ Job Advertisements (MoM) (MAY)	05-06-2018	22:00	NZD	-	(0.021)
Volume of All Buildings SA (QoQ) (1Q)	05-06-2018	22:45	NZD	-	0.014
Markit US Composite PMI (MAY F)	05-06-2018	13:45	USD	-	55.7
Markit US Services PMI (MAY F)	05-06-2018	13:45	USD	-	55.7
ISM Non-Manufacturing (Services Composite) (MAY)	05-06-2018	14:00	USD	-	57.0



JOLTS Job Openings (APR)	05-06-2018	14:00	USD	-	6550
U.S. to Sell 4-Week Bills	05-06-2018	15:30	USD	-	-

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