



06 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,712	(0.1) %	0.4 %
BSE SENSEX	38,963	(0.0) %	0.2 %
CNX BANK	29,954	0.8 %	(1.2) %
CNX MIDCAP	17,465	0.0 %	(4.7) %
CNX SMALLCAP	6,467	(0.0) %	(4.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,505	0.8 %	13.6 %
S&P 500	2,946	1.0 %	17.5 %
FTSE 100	7,381	0.4 %	9.6 %
HANG SENG	30,082	0.5 %	19.7 %
NIKKEI	22,259	(0.2) %	13.8 %
SHANGHAI COMPOSITE	3,078	0.5 %	24.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.49	(0.2) %	0.1 %
EUR/USD	1.12	(0.3) %	(2.3) %
GBP/USD	1.30	(0.1) %	2.3 %
USD/JPY	111.53	0.1 %	1.7 %
USD/AUD	1.43	0.4 %	0.4 %
USD/SGD	1.36	0.2 %	(0.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	14.6 %	52.2 %
Gold(INR/10g)	31,220	(0.3) %	(1.0) %
Gold Comex(USD/oz)	1,280	0.6 %	(0.8) %
SILVER(INR/1Kg)	36,354	(0.3) %	(5.0) %
Aluminium(USD/MT)	1,784	(0.9) %	(4.0) %
Copper(USD/MT)	6,180	(0.5) %	5.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	(0.0) %	(0.1) %

Global Economy: Nonfarm employment in the US soared by much more than expected in the month of April, according to a report released by the Labor Department on Friday, with the unemployment rate dropping to its lowest level in nearly fifty years. The Labor Department said non-farm payroll employment surged up by 263,000 jobs in April following a downwardly revised increase of 189,000 jobs in March. The unemployment rate slipped to 3.6% in April from 3.8% in March. A report released by the Institute for Supply Management on Friday showed a continued slowdown in the pace of US service sector growth in the month of April. The ISM said its non-manufacturing index dropped to 55.5 in April after falling to 56.1 in March. Eurozone's consumer price inflation accelerated in April to its highest level in five months, led by higher energy prices and services costs, preliminary data from Eurostat showed. The consumer price index rose 1.7% year-on-year following a 1.4% increase in March. Core inflation, which excludes prices of energy, food, alcohol and tobacco, edged up to 1.2% from 0.8%. The IHS Markit/CIPS UK Services Purchasing Managers' Index, or PMI, climbed to 50.4 from March's 32-month low of 48.9.

Global Equities: The US stocks jumped on strong jobs data. Excellent gains emerged in technology stocks.

Indian Economy: As per the data from Indian Sugar Mills Association (ISMA), sugar mills across the country have produced 321.19 lakh tonnes of sugar between 1 October 2018 and 30 April 2019. This is about 9.36 lakh tonnes more than 311.83 lakh tonnes produced at the same time last year. However, as compared to 110 sugar mills which were still crushing sugarcane on 30 April 2018 last year, only 100 sugar mills are crushing sugarcane on 30 April 2019 this year. With lesser number of sugar mills working as of now, sugar production in the balance part of the current season will be much less than what was produced from 1 May 2018 to 30 September 2018 last year.

Equity Markets: Local markets saw yet another volatile trading session and ended with minor losses. Weakness in IT shares put pressure on bourses, while gains in financial shares supported the indices at lower levels. Indices opened higher and hit fresh intraday high in morning trade, backed by a correction in crude oil prices.

Corporate News: FMCG major Hindustan Unilever (HUL) saw 14% jump in Q4FY19 net profit at Rs 1,538 crore against Rs 1,351 crore in the same quarter last fiscal. Revenue increased by 9% to Rs 9,945 crore against Rs 9,097 crore. Industry body FICCI has sought the government's intervention for early resumption of mining in Goa, claiming that the Rs 3,400-crore sector that contributes around 10-12% to the state GDP was under severe threat due to the apex court quashing mining leases. Federal Bank net profit rose 160% to Rs 381.51 crore for the Q4 FY19.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	78.4	78.4	150.0
MF(INR cr)	(813.3)	(813.3)	(286.6)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	31,514	33,985	34,909
F&O(INR cr)	644,850	1,429,673	1,210,221

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.9	13.6	13.0
NSE VIX	24.0	23.5	21.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,954	0.8 %	(1.2) %	Energy	16,568	0.4 %	0.2 %
IT	16,093	(1.9) %	1.6 %	Pharma	9,220	(0.8) %	(1.7) %
Metals	3,081	(0.1) %	(0.7) %	Finance	12,637	0.4 %	1.1 %
Auto	8,381	0.6 %	(0.4) %	PSU	3,090	1.1 %	(8.7) %
FMCG	29,751	(1.1) %	(1.5) %	Real Estate	263	1.6 %	(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>
Indiabulls	706	3.8 %	(16.7) %	TCS	2,132	(3.8) %	4.9 %
DLF	178	3.5 %	(9.0) %	Cadila Hea	304	(3.5) %	(11.7) %
Bank of Ba	119	2.7 %	(10.3) %	Britannia	2,696	(3.1) %	(11.6) %
Interglobe	1,578	2.4 %	11.4 %	L&T Fin.Ho	127	(2.6) %	(16.4) %
Siemens	1,176	2.3 %	3.9 %	Aurobindo	779	(2.5) %	(1.7) %

EVENTS CALENDAR

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

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