



06 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,603	0.1 %	3.8 %
BSE SENSEX	34,903	(0.3) %	5.0 %
CNX BANK	26,267	0.1 %	8.0 %
CNX MIDCAP	18,184	(0.1) %	(4.8) %
CNX SMALLCAP	7,273	(0.4) %	(8.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,800	(0.1) %	(0.1) %
S&P 500	2,749	0.1 %	2.0 %
FTSE 100	7,687	(0.7) %	0.5 %
HANG SENG	31,093	0.3 %	1.9 %
NIKKEI	22,540	0.3 %	(4.1) %
SHANGHAI COMPOSITE	3,114	0.7 %	(7.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.15	0.1 %	5.5 %
EUR/USD	1.17	0.6 %	(2.3) %
GBP/USD	1.34	0.5 %	(0.8) %
USD/JPY	109.85	0.3 %	(2.6) %
USD/AUD	1.31	(1.2) %	2.1 %
USD/SGD	1.33	(0.5) %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	1.2 %	8.5 %
Gold(INR/10g)	30,623	(0.3) %	4.3 %
Gold Comex(USD/oz)	1,301	0.4 %	(0.6) %
SILVER(INR/1Kg)	39,225	(0.2) %	1.6 %
Aluminium(USD/MT)	2,315	(0.4) %	2.6 %
Copper(USD/MT)	6,971	0.5 %	(2.9) %

FIXED INCOME

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

Global Economy: Activity in the US service sector grew at a faster than expected rate in the month of May, according to a report released by the Institute for Supply Management on Tuesday. The ISM said its non-manufacturing index climbed to 58.6 in May from 56.8 in April. Eurozone private sector grew at the slowest pace in one-and-a-half years, as initially estimated, in May, final data from IHS Markit showed. The composite output index dropped to 54.1 from 55.1 in April, The headline index has nevertheless signaled expansion in each of the past 59 months. The services Purchasing Managers' Index declined to 53.8 from 54.7 in the prior month. The reading was just below the flash reading of 53.9. The Eurozone retail sales logged a marginal growth in April, data from Eurostat showed. Retail sales rose 0.1% month-on-month in April, slower than the 0.4% increase in March.

Global Equities: European stocks advanced, adding to their recent gains with tech shares bolstered by gains for their Wall Street counterparts. Commodity linked shares also witnessed some gains.

Indian Economy: A combination of elevated crude oil price and weak rupee, if sustained for more than a quarter, will have an adverse impact on India's current account position, inflation, monetary policy stance and fiscal balance, India Ratings and Research (Ind-Ra) said in a report. The rating agency said that if crude basket averages \$68-72.86 a barrel and rupee averages 66.6-67 for every dollar for FY19, the current account deficit could widen \$22 billion-31 billion for the year.

Equity Markets: Domestic stocks slipped in a volatile session of trade yesterday. The barometer index, the S&P BSE Sensex, fell 108.68 points or 0.31% to settle at 34,903.21. The Nifty 50 index fell 35.35 points or 0.33% to settle at 10,593.15. The Sensex settled below the psychologically important 35,000 mark. A survey showing services activity in May shrank for the first time in three months as new orders stagnated dampened sentiment.

Corporate News: Banking stocks would be in focus as markets eye the Reserve Bank of India's (RBI) Monetary Policy Committee (MPC) meeting. The resolution of the MPC will be unveiled at 14:30 pm today. India's service sector reported a contraction in business activity for the first time in three months and a broad stagnation in new orders. Reflecting competitive conditions, jobs growth slowed to the weakest since last December. On the price front, input cost inflation picked up from April's recent low and was solid overall. The seasonally adjusted Nikkei India Services Business Activity Index fell from 51.4 to 49.6 in May. This was indicative of a marginal contraction in business activity, following a two-month period of growth. According to anecdotal evidence, competitive demand conditions were the key factor behind a decline in output. The headline seasonally adjusted Nikkei India Composite PMI Output Index fell from 51.9 in April to 50.4 in May. NMDC's production & sales of iron ore on a provisional basis upto May 2018 was 4.53 million tonnes. The announcement was made after market hours yesterday, 5 June 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	444.3	231.4	(43.3)
MF(INR cr)	112.5	112.5	519.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,539	23,263	33,873
F&O(INR cr)	615,928	590,537	798,563

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.7	13.1	16.0
NSE VIX	13.3	13.6	13.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,251	(0.0) %	7.9 %	Energy	13,545	0.3 %	1.9 %
IT	13,409	(1.4) %	5.5 %	Pharma	8,118	(1.1) %	(5.8) %
Metals	3,554	(0.6) %	0.4 %	Finance	10,889	0.1 %	6.1 %
Auto	10,987	(0.3) %	(0.6) %	PSU	2,881	(0.4) %	0.9 %
FMCG	28,346	(0.2) %	7.0 %	Real Estate	279	(1.0) %	(6.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Cipla	542	4.1 %	(5.9) %	Idea Cellu	57	(10.1) %	(27.3) %
Bajaj Fin.	2,101	1.8 %	15.5 %	Shriram Tr	1,381	(4.5) %	(6.0) %
Container	1,335	1.6 %	7.5 %	Rural Elec	109	(4.1) %	(15.0) %
Marico	326	1.2 %	(0.6) %	Power Fin.	79	(3.7) %	(9.3) %
Tata Steel	572	1.1 %	(1.2) %	Piramal En	2,331	(3.1) %	(5.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Gross Domestic Product (QoQ) (1Q)	06-06-2018	1:30	AUD	-	0.004
Gross Domestic Product (YoY) (1Q)	06-06-2018	1:30	AUD	-	0.024
AiG Performance of Construction Index (MAY)	06-06-2018	22:30	AUD	-	55.4
Building Permits (MoM) (APR)	06-06-2018	12:30	CAD	-	0.031
International Merchandise Trade (Canadian dollar) (APR)	06-06-2018	12:30	CAD	-	-
Ivey Purchasing Managers Index s.a. (MAY)	06-06-2018	14:00	CAD	-	71.5
Consumer Price Index (MoM) (MAY)	06-06-2018	7:15	CHF	-	0.002
Consumer Price Index (YoY) (MAY)	06-06-2018	7:15	CHF	-	0.008
CPI EU Harmonized (MoM) (MAY)	06-06-2018	7:15	CHF	-	0.002
CPI EU Harmonized (YoY) (MAY)	06-06-2018	7:15	CHF	-	0.004
ECB's Praet Speaks in Berlin	06-06-2018	7:00	EUR	-	-
Markit Germany Construction PMI (MAY)	06-06-2018	7:30	EUR	-	50.9
Markit Eurozone Retail PMI (MAY)	06-06-2018	8:10	EUR	-	48.6
Markit France Retail PMI (MAY)	06-06-2018	8:10	EUR	-	50.1
Markit Germany Retail PMI (MAY)	06-06-2018	8:10	EUR	-	51
Markit Italy Retail PMI (MAY)	06-06-2018	8:10	EUR	-	42.7
BOE's Tenreyro Speaks at CBI Event in Belfast	06-06-2018	10:00	GBP	-	-
BOE's McCafferty Speaks on LBC Radio	06-06-2018	15:00	GBP	-	-
Labor Cash Earnings (YoY) (APR)	06-06-2018	0:00	JPY	-	0.021
Real Cash Earnings (YoY) (APR)	06-06-2018	0:00	JPY	-	0.008
BOJ Outright Bond Purchase 1~3 Years	06-06-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	06-06-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	06-06-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (JUN 01)	06-06-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUN 01)	06-06-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUN 01)	06-06-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUN 01)	06-06-2018	23:50	JPY	-	-
Official Reserve Assets (MAY)	06-06-2018	23:50	JPY	-	-
ANZ Commodity Price (MAY)	06-06-2018	1:00	NZD	-	0.01



QV House Prices (YoY) (MAY)	06-06-2018	17:00	NZD	-	0.076
MBA Mortgage Applications (JUN 01)	06-06-2018	11:00	USD	-	(0.029)
Nonfarm Productivity (1Q F)	06-06-2018	12:30	USD	-	0.007
Revisions: Trade Balance	06-06-2018	12:30	USD	-	-
Trade Balance (APR)	06-06-2018	12:30	USD	-	-
Unit Labor Costs (1Q F)	06-06-2018	12:30	USD	-	0.027
DOE Cushing OK Crude Inventory (JUN 01)	06-06-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 01)	06-06-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUN 01)	06-06-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUN 01)	06-06-2018	14:30	USD	-	-

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