



08 May.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,302	0.2 %	0.7 %
BSE SENSEX	29,859	(0.9) %	(0.1) %
CNX BANK	22,641	0.2 %	5.1 %
CNX MIDCAP	18,094	0.3 %	4.4 %
CNX SMALLCAP	7,482	0.3 %	5.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,007	0.3 %	5.7 %
S&P 500	2,399	0.4 %	6.3 %
FTSE 100	7,297	0.7 %	1.7 %
HANG SENG	24,476	(0.8) %	10.5 %
NIKKEI	19,446	0.7 %	(0.8) %
SHANGHAI COMPOSITE	3,103	(0.8) %	(1.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.38	0.3 %	(4.5) %
EUR/USD	1.10	0.2 %	3.8 %
GBP/USD	1.30	0.5 %	5.6 %
USD/JPY	112.70	0.1 %	(2.8) %
USD/AUD	1.35	(0.4) %	(1.5) %
USD/SGD	1.40	0.3 %	(1.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	1.5 %	(11.7) %
Gold(INR/10g)	28,227	0.2 %	1.5 %
Gold Comex(USD/oz)	1,228	(0.0) %	6.1 %
SILVER(INR/1Kg)	38,123	0.1 %	(2.1) %
Aluminium(USD/MT)	1,907	(0.1) %	12.0 %
Copper(USD/MT)	5,531	(0.2) %	(0.8) %

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: The keenly watched Nonfarm Payrolls data showed that job growth in the US accelerated by much more than anticipated in the month of April after showing a notable slowdown in March. The non-farm payroll employment jumped by 211,000 jobs in April after rising by a downwardly revised 79,000 jobs in March. The bigger than expected increase in employment was partly due to strength in the leisure and hospitality sector, which added 55,000 jobs. The health care and social assistance, financial activities, and mining sectors also saw notable job growth during the month. With the stronger than expected job growth, the unemployment rate edged down to 4.4% in April from 4.5% in March. This is near a decade low mark.

Global Equities: Asian stocks after pro-European Union centrist candidate Emmanuel Macron defeated far-right candidate Marine Le Pen to win the closely-watched French presidential election. Japan's Nikkei 225 Index hit a seventeen-month intraday high.

Indian Economy: The promulgation of the Banking Regulation (Amendment) Ordinance, 2017 inserting two new Sections (viz. 35AA and 35AB) after Section 35A of the Banking Regulation Act, 1949 enables the Union Government to authorize the Reserve Bank of India (RBI) to direct banking companies to resolve specific stressed assets by initiating insolvency resolution process, where required. The RBI has also been empowered to issue other directions for resolution, and appoint or approve for appointment, authorities or committees to advise banking companies for stressed asset resolution.

Equity Markets: On Friday, key indices opened the session on a weaker note amid initial volatility on subdued global cues. Indices further extended slide as the day's trade progressed. Weakness in European indices also added to the dull market mood. Profit booking materialised after Nifty scaled record closing high in the previous session. The Sensex settled below the psychological 30,000 level after alternately moving above and below that level in intraday trade.

Corporate News: Shares of cement majors ACC and Ambuja Cements will be watched. ACC and Ambuja Cements announced that their respective boards have agreed to start the evaluation of a potential merger between the two companies with a view to combine the strengths of both businesses. A special committee of directors, comprising largely of independent directors, has been constituted to commence the evaluation, ACC and Ambuja Cements said in separate statements after market hours on Friday, 5 May 2017. TCS announced that it has opened its first Drones Research Lab in the US at its Seven Hills Park Innovation centre located in Cincinnati, Ohio to address the rapidly expanding demand for unmanned aerial vehicles and business solutions across industries. Drones Research Lab is an extension of the global TCS Research and Innovation ecosystem bringing the combined expertise of its labs, start-ups, academia, and technology partners closer to customers. Iron ore mining major NMDC produced 2.98 million tonnes and sold 3.56 million tonnes of iron ore during April 2017.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(21.8)	(29.4)	(20.6)
MF(INR cr)	258.4	583.4	583.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,455	31,274	30,557
F&O(INR cr)	401,284	472,173	515,835

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.6	10.5	12.6
NSE VIX	12.0	11.6	11.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,605	(0.5) %	4.9 %	Energy	11,925	(1.8) %	0.9 %
IT	10,086	(0.2) %	(4.8) %	Pharma	9,935	(0.4) %	(5.4) %
Metals	2,857	(2.4) %	(8.0) %	Finance	9,165	(0.7) %	3.8 %
Auto	10,108	(1.0) %	1.9 %	PSU	3,751	(1.8) %	6.4 %
FMCG	23,630	(1.3) %	(0.0) %	Real Estate	255	(0.9) %	16.4 %

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	1,106	2.7 %	11.1 %	Bank of Ba	187	(4.3) %	8.7 %
ACC	1,660	2.2 %	13.6 %	Hind.Zinc	250	(4.0) %	(14.1) %
Cadila Hea	466	1.8 %	5.2 %	Tata Motor	420	(3.9) %	(10.8) %
Adani Port	345	1.6 %	0.8 %	Vedanta	224	(3.8) %	(18.0) %
HCL Techno	830	1.4 %	(4.2) %	Hindalco I	186	(3.5) %	(4.0) %

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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