



08 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,737	(0.3) %	5.1 %
BSE SENSEX	35,463	0.8 %	6.3 %
CNX BANK	26,363	(0.6) %	8.4 %
CNX MIDCAP	18,722	(0.1) %	(2.0) %
CNX SMALLCAP	7,605	0.2 %	(4.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,241	0.4 %	1.7 %
S&P 500	2,770	(0.1) %	2.8 %
FTSE 100	7,704	(0.1) %	0.7 %
HANG SENG	31,513	0.8 %	3.3 %
NIKKEI	22,823	0.9 %	(2.9) %
SHANGHAI COMPOSITE	3,110	(0.2) %	(7.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.13	(0.0) %	5.4 %
EUR/USD	1.18	0.6 %	(1.7) %
GBP/USD	1.34	0.1 %	(0.7) %
USD/JPY	109.73	(0.1) %	(2.7) %
USD/AUD	1.31	0.5 %	2.6 %
USD/SGD	1.33	0.0 %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(1.2) %	7.2 %
Gold(INR/10g)	30,690	0.1 %	4.5 %
Gold Comex(USD/oz)	1,301	(0.0) %	(0.6) %
SILVER(INR/1Kg)	39,805	0.8 %	3.1 %
Aluminium(USD/MT)	2,318	0.1 %	2.7 %
Copper(USD/MT)	7,147	2.5 %	(0.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

Global Economy: The euro area economy expanded as initially estimated in the first quarter, the latest estimate from Eurostat showed. Gross domestic product (GDP) rose 0.4% sequentially in the first quarter, slower than the 0.7% expansion seen a quarter ago. The rate came in line with the estimate released on May 15. On a yearly basis, GDP growth slowed to 2.5% from 2.8% a quarter ago. Gross fixed capital formation advanced 0.5% following the 1.3% gain seen in the prior period. UK house prices rebounded in May, data from the Lloyds bank subsidiary Halifax and IHS Markit showed Thursday. House prices grew 1.5% month-on-month, reversing a 3.1% fall in April. In three months to May, house prices rose 1.9% from the previous year, slower than the 2.2% increase in three months to April. On a quarterly basis, house prices added 0.2% in three months to May compared to a 0.1% fall in three months to April. Germany's factory orders slipped 2.5% on month in April, bigger than the revised 1.1% decrease seen in March. The decline was primarily because a 4.8% drop in domestic orders. The foreign orders decreased only 0.8% though. On a yearly basis, factory orders fell marginally by 0.1% in April following March's 2.9% spurt.

Global Equities: US stocks saw a mixed trend as traders eyed trade disputes between the United States and its major trade partners ahead of the Group of Seven (G7) summit.

Indian Economy: Foreign Direct Investment to India decreased to \$40 billion last year from \$44 billion in 2016 while outflows from India more than doubled, according to a new trade report by the UN. According to the World Investment Report 2018 by the UN Conference on Trade and Development (UNCTAD) global foreign direct investment flows fell by 23% in 2017, to \$1.43 trillion from \$1.87 trillion in 2016.

Equity Markets: Local stocks surged on upbeat global cues. Gains were led by index heavyweights Reliance Industries, ICICI Bank and Infosys. The Sensex and the Nifty, both, settled at over 3-week high. Sustained buying by domestic institutional investors also boosted sentiment. Metal, reality and banking shares stayed supported.

Corporate News: L&T Group firm Nabha Power Ltd (NPL) said it has been forced to shut a 700 MW unit of Rajpura thermal power station due to shortage of coal. Hindustan Construction Co (HCC) announced that its JV with MAX Group has won a Rs 737 crore contract from Russia for a nuclear power plant in Bangladesh. The contract includes civil works of Turbine Island for Unit 1 of Rooppur Nuclear Power Plant (NPP). Soaring Copper prices are likely to support the domestic metal and mining players. The COMEX Copper futures soared near their 2018 highs on supply worries.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	2.8	121.4	(40.9)
MF(INR cr)	112.5	112.5	519.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,242	26,449	33,760
F&O(INR cr)	1,818,787	884,044	820,469

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.6	12.6	15.8
NSE VIX	12.8	13.2	13.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,518	0.6 %	9.0 %	Energy	13,793	1.3 %	3.8 %
IT	13,684	1.1 %	7.7 %	Pharma	8,252	0.2 %	(4.3) %
Metals	3,673	1.5 %	3.8 %	Finance	11,057	0.8 %	7.8 %
Auto	11,236	0.7 %	1.6 %	PSU	2,970	0.6 %	4.1 %
FMCG	28,864	0.9 %	8.9 %	Real Estate	291	3.0 %	(1.8) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
S A I L	83	7.1 %	13.3 %	Bosch	18,620	(1.8) %	0.6 %
Rural Elec	117	5.7 %	(8.6) %	Titan Comp	887	(1.4) %	(6.0) %
A B B	1,259	5.2 %	(2.6) %	IndusInd B	1,900	(1.0) %	5.3 %
Idea Cellu	62	4.8 %	(20.6) %	Ashok Leyl	148	(0.8) %	(0.2) %
Bharat Ele	122	4.7 %	(15.9) %	Eicher Mot	29,712	(0.8) %	5.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Housing Starts (MAY)	08-06-2018	12:15	CAD	-	-
Capacity Utilization Rate (1Q)	08-06-2018	12:30	CAD	-	0.86
Full Time Employment Change (MAY)	08-06-2018	12:30	CAD	-	28.8
Hourly Earnings Permanent Employees (YoY) (MAY)	08-06-2018	12:30	CAD	-	0.033
Net Change in Employment (MAY)	08-06-2018	12:30	CAD	-	-
Part Time Employment Change (MAY)	08-06-2018	12:30	CAD	-	(30)
Participation Rate (MAY)	08-06-2018	12:30	CAD	-	65.4
Unemployment Rate (MAY)	08-06-2018	12:30	CAD	-	0.058
German Current Account (euros) (APR)	08-06-2018	6:00	EUR	-	-
German Exports s.a. (MoM) (APR)	08-06-2018	6:00	EUR	-	0.017
German Imports s.a. (MoM) (APR)	08-06-2018	6:00	EUR	-	(0.009)
German Industrial Production n.s.a. and w.d.a. (YoY) (APR)	08-06-2018	6:00	EUR	-	0.032
German Industrial Production s.a. (MoM) (APR)	08-06-2018	6:00	EUR	-	0.01
German Trade Balance (APR)	08-06-2018	6:00	EUR	-	-
Labor Costs SA (QoQ) (1Q)	08-06-2018	6:00	EUR	-	0.004
Labor Costs WDA (YoY) (1Q)	08-06-2018	6:00	EUR	-	0.015
ECB's Mersch Speaks in Paris	08-06-2018	7:15	EUR	-	-
BoE/TNS Inflation Next 12 Mths (MAY)	08-06-2018	8:30	GBP	-	0.029
BOJ Outright Bond Purchase 10~25 Years	08-06-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	08-06-2018	1:10	JPY	-	-
Bankruptcies (YoY) (MAY)	08-06-2018	4:30	JPY	-	(0.0441)
Eco Watchers Survey Current (MAY)	08-06-2018	5:00	JPY	-	49
Eco Watchers Survey Outlook SA (MAY)	08-06-2018	5:00	JPY	-	50.1
Wholesale Inventories (MoM) (APR F)	08-06-2018	14:00	USD	-	0
Wholesale Trade Sales (MoM) (APR)	08-06-2018	14:00	USD	-	0.003
Baker Hughes U.S. Rig Count (JUN 08)	08-06-2018	17:00	USD	-	1060

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