



09 May.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,328	0.1 %	1.0 %
BSE SENSEX	29,926	0.2 %	0.3 %
CNX BANK	22,796	0.1 %	5.8 %
CNX MIDCAP	18,237	0.4 %	5.2 %
CNX SMALLCAP	7,589	0.6 %	7.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,012	0.0 %	5.7 %
S&P 500	2,399	0.0 %	6.3 %
FTSE 100	7,301	0.1 %	1.7 %
HANG SENG	24,578	0.4 %	11.0 %
NIKKEI	19,896	2.3 %	1.5 %
SHANGHAI COMPOSITE	3,079	(0.8) %	(1.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.31	0.2 %	(4.6) %
EUR/USD	1.09	(0.5) %	3.1 %
GBP/USD	1.29	0.3 %	5.3 %
USD/JPY	113.31	0.6 %	(2.3) %
USD/AUD	1.35	0.0 %	(1.1) %
USD/SGD	1.41	0.4 %	(1.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	0.5 %	(11.3) %
Gold(INR/10g)	28,161	(0.2) %	1.3 %
Gold Comex(USD/oz)	1,228	(0.0) %	6.1 %
SILVER(INR/1Kg)	37,869	(0.7) %	(2.7) %
Aluminium(USD/MT)	1,879	(1.5) %	10.4 %
Copper(USD/MT)	5,466	(1.2) %	(1.9) %

**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:** China's exports and imports expanded less than expected in April, figures from the General Administration of Customs revealed Monday. Exports grew 8% in April from the prior year, but slower than March's 16.4% increase. At the same time, imports rose by 11.9%. Germany's factory orders grew for the second straight month in March, albeit at a slower pace on weak domestic orders, data from Destatis showed Monday. Orders grew 1% month-on-month in March, in line with expectations, but slower than the revised 3.5% increase in February. This was the second consecutive rise in orders following a sharp 6.7% drop in January. Japan's consumer confidence weakened for the first time in five months in April, survey data from the Cabinet Office showed. The consumer confidence index dropped to 43.2 in April from 43.9 in March, which was the highest score since September 2013.

**Global Equities:** US stocks showed a lack of direction on Monday before ending the trading day roughly flat. However, the Nasdaq and the S&P 500 still inched up to new record closing highs.

**Indian Economy:** With tremendous opportunities available in the Indian economy, further strengthening of the growth process and job creation is on the horizon, said Shobana Kamineni, President, CII. The reform agenda has picked up with substantive policies such as the goods and services tax (GST), insolvency and bankruptcy norms, FDI liberalisation and ease of doing business being implemented. Conditions are positive for an economic recovery in the current year, with GDP growth expected to lie in the range of 7.5-8.0%. One of the key priorities for CII this year would be to help revive domestic investment, which has been flagging and the economy has been growing largely on the back of exceptionally high government spending on infrastructure, etc Kamineni said.

**Equity Markets:** Trading for the week started on a positive note as key indices settled with small gains after a range bound trade. Emmanuel Macron's victory as France's next president supported gains on most of the Asian stocks.

**Corporate News:** S Chand and Company will list on the secondary equity market today, 9 May 2017. The company priced the initial public offer (IPO) at Rs 670 per share, the top end of the Rs 660 - Rs 670 per share price band for the IPO. The IPO closed on 28 April 2017. It was subscribed 59.49 times, with total bids for 45.72 crore shares. On a consolidated basis, Bharti Infratel's net profit fell 16.95% to Rs 596.60 crore on 13.20% increase in net sales to Rs 1605.30 crore in Q4 March 2017 over Q4 March 2016. ABB India's net profit rose 3.2% to Rs 88.17 crore on 8.4% increase in net sales to Rs 2146.04 crore in Q1 March 2017 over Q1 March 2016. The orders received in Q1 March 2017 was Rs 2342 crore. An order backlog of Rs 12023 crore, as on 31 March 2017, provides solid visibility for future revenue, the company said in a statement. Novartis India announced that Novartis AG (NVS AG) entered into an asset sale agreement with Torrent Pharmaceuticals, pursuant to which NVS AG has agreed to sell to Torrent Novartis brand (Regestrone) including the intellectual property rights residing in the related product dossier. The transaction was approved by the Competition Commission of India on 20 April 2017. Accordingly it may be noted that, effective 8 May 2017, Novartis India will cease to have the ability to market or otherwise use the brand in any manner whatsoever. Smartlink Network Systems said it has made an additional investment of Rs 1 crore in its wholly owned subsidiary Telesmart SCS.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(38.6)	(31.7)	(21.4)
MF(INR cr)	229.1	600.2	586.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	25,303	30,080	30,329
F&O(INR cr)	301,010	437,941	506,495

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.6	10.5	12.6
NSE VIX	11.7	11.6	11.6

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	22,767	0.7 %	5.7 %	Energy	11,910	(0.1) %	0.8 %
IT	10,209	1.2 %	(3.6) %	Pharma	10,021	0.9 %	(4.6) %
Metals	2,854	(0.1) %	(8.1) %	Finance	9,181	0.2 %	4.0 %
Auto	10,167	0.6 %	2.5 %	PSU	3,791	1.1 %	7.5 %
FMCG	23,442	(0.8) %	(0.8) %	Real Estate	266	4.2 %	21.2 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	88	6.8 %	2.9 %	Colgate-Pa	986	(2.6) %	(2.0) %
DLF	197	6.1 %	34.2 %	LIC Housin	704	(2.4) %	12.6 %
Ambuja Cem	261	5.8 %	9.8 %	ITC	273	(1.5) %	(3.1) %
P & G Hygi	7,823	5.7 %	5.9 %	Petronet L	425	(1.4) %	2.7 %
ICICI Pru	410	4.7 %	6.5 %	Titan Comp	485	(1.4) %	5.5 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales Ex Inflation(QoQ) (1Q)	09-05-2017	1:30	AUD	-	0.009
Retail Sales s.a. (MoM) (MAR)	09-05-2017	1:30	AUD	-	(0.001)
Building Permits (MoM) (MAR)	09-05-2017	12:30	CAD	-	(0.025)
Unemployment Rate (APR)	09-05-2017	5:45	CHF	-	0.034
Unemployment Rate s.a. (APR)	09-05-2017	5:45	CHF	-	0.033
German Current Account (euros) (MAR)	09-05-2017	6:00	EUR	-	-
German Exports s.a. (MoM) (MAR)	09-05-2017	6:00	EUR	-	0.008
German Imports s.a. (MoM) (MAR)	09-05-2017	6:00	EUR	-	(0.016)
German Industrial Production n.s.a. and w.d.a. (YoY) (MAR)	09-05-2017	6:00	EUR	-	0.025
German Industrial Production s.a. (MoM) (MAR)	09-05-2017	6:00	EUR	-	0.022
German Trade Balance (euros) (MAR)	09-05-2017	6:00	EUR	-	-
BOJ Summary of Opinions at April 26-27 Meeting	09-05-2017	23:50	JPY	-	-
Labor Cash Earnings (YoY) (MAR)	09-05-2017	0:00	JPY	-	0.004
Official Reserve Assets (APR)	09-05-2017	23:50	JPY	-	-
Real Cash Earnings (YoY) (MAR)	09-05-2017	0:00	JPY	-	0
ANZ Truckometer Heavy (MoM) (APR)	09-05-2017	22:00	NZD	-	0.017
Card Spending Retail (MoM) (APR)	09-05-2017	22:45	NZD	-	(0.003)
NZ Card Spending (MoM) (APR)	09-05-2017	22:45	NZD	-	0.005
Fed's Kaplan Speaks to Dallas Regional Chamber	09-05-2017	20:15	USD	-	-
Fed's Kashkari to Speak to Minnesota High Tech Conference	09-05-2017	13:00	USD	-	-
Fed's Rosengren Speaks at NYU Conference on Risk Management	09-05-2017	17:00	USD	-	-
JOLTS Job Openings (MAR)	09-05-2017	14:00	USD	-	5743
NFIB Small Business Optimism (APR)	09-05-2017	10:00	USD	-	104.7
U.S. to Sell 4-Week Bills	09-05-2017	15:30	USD	-	-
U.S. to Sell USD24 Bln 3-Year Notes	09-05-2017	17:00	USD	-	-
Wholesale Inventories (MAR F)	09-05-2017	14:00	USD	-	(0.001)
Wholesale Trade Sales (MoM) (MAR)	09-05-2017	14:00	USD	-	0.006

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