



09 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,717	(0.0) %	4.9 %
BSE SENSEX	35,216	0.0 %	6.0 %
CNX BANK	26,069	(0.1) %	7.2 %
CNX MIDCAP	19,809	(0.2) %	3.7 %
CNX SMALLCAP	8,300	0.0 %	4.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,360	0.0 %	(1.9) %
S&P 500	2,672	(0.0) %	(0.9) %
FTSE 100	7,566	(0.0) %	(1.1) %
HANG SENG	30,403	1.4 %	(0.4) %
NIKKEI	22,509	0.2 %	(4.2) %
SHANGHAI COMPOSITE	3,162	0.8 %	(5.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.08	(0.1) %	5.4 %
EUR/USD	1.18	(0.6) %	(1.4) %
GBP/USD	1.35	(0.2) %	0.2 %
USD/JPY	109.55	0.5 %	(2.8) %
USD/AUD	1.35	1.0 %	5.3 %
USD/SGD	1.34	0.5 %	0.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	(2.4) %	14.4 %
Gold(INR/10g)	31,082	(0.3) %	5.9 %
Gold Comex(USD/oz)	1,311	(0.2) %	0.2 %
SILVER(INR/1Kg)	39,232	0.0 %	1.6 %
Aluminium(USD/MT)	2,384	2.9 %	5.7 %
Copper(USD/MT)	6,722	(0.9) %	(6.4) %

FIXED INCOME

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

Global Economy: China's April exports rose 12.9% from a year earlier, rebounding from a drop in March, while imports grew 21.5%, both growing much faster than expected despite worries over an escalating trade dispute with the United States. That left the country with a trade surplus of \$28.78 billion for the month. Germany's industrial production grew by more-than-expected 1% month-on-month in March, reversing a 1.7% fall in February, provisional data from Destatis showed. On a yearly basis, industrial output logged a growth of 3.2% versus 2.2% increase in February. Australia seasonally adjusted retail trade turnover showed no variations in March, following a 0.6% rise in February, data from the Australian Bureau of Statistics revealed Tuesday.

Global Equities: US markets came under pressure following President Donald Trump's announcement of his decision to withdraw from an international agreement intended to limit Iran's nuclear program.

Indian Economy: The retail selling price of LPG (non-subsidized price) at Delhi has come down from Rs.747/- in the month of December, 2017 to Rs.650.50/- in the month of May, 2018, a fall of Rs.96.50/-. This is the price at which a consumer purchases the cylinder refill and the subsidy gets transferred to his account. Effective cost to consumer after subsidy has also come down from Rs.495.69/- in December, 2017 to Rs.491.21/- in May, 2018. This is the actual cost the consumer bears for a LPG refill.

Equity Markets: Local indices ended a tad in the green after a volatile session of trade amid divergent trend in index pivots. PSU bank stocks rose. Private bank stocks fell. Realty shares saw mixed trend. Total inflows to equity mutual fund schemes for April stood at Rs 25,221 crore, shows AMFI data. The inflows are the lowest since the last 12 months. Inflows in the April last year stood at Rs 19,180 crore.

Corporate News: IT counters could be in focus following the weakness in the Indian Rupee. The Indian currency extended its recent losses and tested a 15-month low of 67.20 against the US dollar yesterday as the greenback extended gains and soaring crude oil prices triggered worries about India's current account deficit. Lupin said YL Biologics (YLB) - its joint venture firm with Japanese drug maker Yoshindo - has submitted a New Drug Application (NDA) before Japan's drug regulator to sell biosimilar of Etanercept for treatment of autoimmune disease Rheumatoid Arthritis. SBI General Insurance posted almost 160% increase in its net profit for FY18 at Rs 396 crore because of a one-time gain of Rs 131 crore. The insurer also posted its maiden underwriting profit of Rs 32 crore in FY18, compared to underwriting loss of Rs 197 crore in the year ago period.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(89.8)	(97.9)	(55.0)
MF(INR cr)	294.1	178.0	459.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,756	35,413	34,236
F&O(INR cr)	549,795	629,816	721,896

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.7	15.3	17.6
NSE VIX	14.1	13.4	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,091	0.9 %	7.2 %	Energy	13,881	0.1 %	4.4 %
IT	13,380	(0.3) %	5.3 %	Pharma	8,753	(0.2) %	1.5 %
Metals	3,689	(0.2) %	4.2 %	Finance	10,865	0.5 %	5.9 %
Auto	11,437	(0.5) %	3.4 %	PSU	2,877	1.3 %	0.8 %
FMCG	28,555	(0.1) %	7.7 %	Real Estate	317	1.2 %	7.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Bank	309	6.7 %	18.1 %	United Spi	3,360	(3.4) %	2.9 %
Container	1,399	3.7 %	12.7 %	Bosch	19,024	(2.9) %	2.8 %
H P C L	307	3.4 %	(10.9) %	Ambuja Cem	229	(2.5) %	(4.5) %
DLF	222	3.1 %	10.7 %	M & M	865	(2.3) %	15.7 %
Interglobe	1,196	2.4 %	(10.0) %	Idea Cellu	61	(2.0) %	(21.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Permits (MoM) (MAR)	09-05-2018	12:30	CAD	-	(0.026)
Bank of Canada's Filipe Dinis Speaks on Cyber Security	09-05-2018	21:15	CAD	-	-
RICS House Price Balance (APR)	09-05-2018	23:01	GBP	-	0
Labor Cash Earnings (YoY) (MAR)	09-05-2018	0:00	JPY	-	0.013
Real Cash Earnings (YoY) (MAR)	09-05-2018	0:00	JPY	-	(0.005)
BOJ Outright Bond Purchase 1~3 Years	09-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	09-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	09-05-2018	1:10	JPY	-	-
Adjusted Current Account Total (Yen) (MAR)	09-05-2018	23:50	JPY	-	-
Bank Lending Ex-Trusts (YoY) (APR)	09-05-2018	23:50	JPY	-	0.019
Bank Lending incl Trusts (YoY) (APR)	09-05-2018	23:50	JPY	-	0.02
BOJ Summary of Opinions	09-05-2018	23:50	JPY	-	-
BoP Current Account Balance (MAR)	09-05-2018	23:50	JPY	-	-
Foreign Buying Japan Bonds (MAY 4)	09-05-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAY 4)	09-05-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAY 4)	09-05-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAY 4)	09-05-2018	23:50	JPY	-	-
Trade Balance - BOP Basis (Yen) (MAR)	09-05-2018	23:50	JPY	-	-
Coincident Index (MAR P)	09-05-2018	5:00	JPY	-	116.1
Leading Index CI (MAR P)	09-05-2018	5:00	JPY	-	106
RBNZ Official Cash Rate (MAY 10)	09-05-2018	21:00	NZD	-	0.0175
MBA Mortgage Applications (MAY 4)	09-05-2018	11:00	USD	-	(0.025)
Producer Price Index Ex Food and Energy (MoM) (APR)	09-05-2018	12:30	USD	-	0.003
Producer Price Index Ex Food and Energy (YoY) (APR)	09-05-2018	12:30	USD	-	0.027
Producer Price Index Ex Food, Energy, Trade (MoM) (APR)	09-05-2018	12:30	USD	-	0.004
Producer Price Index Ex Food, Energy, Trade (YoY) (APR)	09-05-2018	12:30	USD	-	0.029
Producer Price Index Final Demand (MoM) (APR)	09-05-2018	12:30	USD	-	0.003
Producer Price Index Final Demand (YoY) (APR)	09-05-2018	12:30	USD	-	0.03
Wholesale Inventories (MoM) (MAR P)	09-05-2018	14:00	USD	-	0.005



Wholesale Trade Sales (MoM) (MAR)	09-05-2018	14:00	USD	-	0.01
DOE Cushing OK Crude Inventory (MAY 4)	09-05-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAY 4)	09-05-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (MAY 4)	09-05-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (MAY 4)	09-05-2018	14:30	USD	-	-
U.S. to Sell USD25 Bln 10-Year Notes	09-05-2018	17:00	USD	-	-
Fed's Bostic Speaks on Economic Outlook and Monetary Policy	09-05-2018	17:15	USD	-	-

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