



10 Apr.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,650	(0.2) %	(0.2) %
BSE SENSEX	38,939	0.6 %	0.0 %
CNX BANK	30,114	0.0 %	(0.7) %
CNX MIDCAP	18,127	0.0 %	(1.1) %
CNX SMALLCAP	6,656	0.0 %	(1.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,151	(0.7) %	12.1 %
S&P 500	2,878	(0.6) %	14.8 %
FTSE 100	7,426	(0.4) %	10.3 %
HANG SENG	30,157	0.3 %	20.0 %
NIKKEI	21,803	0.2 %	11.5 %
SHANGHAI COMPOSITE	3,240	(0.2) %	31.4 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.44	0.7 %	0.0 %
EUR/USD	1.13	0.4 %	(1.6) %
GBP/USD	1.31	(0.5) %	2.5 %
USD/JPY	111.24	(0.2) %	1.5 %
USD/AUD	1.40	(0.3) %	(1.4) %
USD/SGD	1.35	(0.0) %	(0.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	(0.7) %	37.5 %
Gold(INR/10g)	31,886	(0.1) %	1.1 %
Gold Comex(USD/oz)	1,302	0.4 %	0.8 %
SILVER(INR/1Kg)	37,765	0.3 %	(1.3) %
Aluminium(USD/MT)	1,851	(0.4) %	(0.4) %
Copper(USD/MT)	6,498	6.0 %	11.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	(0.0) %	(0.1) %

**Global Economy:** The International Monetary Fund (IMF) on Tuesday downgraded the economic outlook for 2019 indicating a slowing global economy and urging leaders to be careful in what it called a "delicate moment." The fund's updated forecast calls for 3.3% growth this year -- down from 3.5% in January. The IMF added that it expects the economy to expand by 3.6% in 2020. Higher trade policy uncertainty and concerns of escalation and retaliation would reduce business investment, disrupt supply chains, and slow productivity growth, says the fund. Growth in the emerging market and developing economies is projected to rise to 4.8% next year from 4.4% this year.

**Global Equities:** The Dow Jones Industrial Average fell for a second straight day on global growth worries. The Dow and S&P 500 both posted their worst session since March 22, while the Nasdaq Composite saw its largest drop since March 27.

**Indian Economy:** The IMF on Tuesday cut India's GDP growth forecast for 2019-20. "In India, growth is projected to pick up to 7.3% in 2019 (2019-20) and 7.5% in 2020, supported by the continued recovery of investment and robust consumption amid a more expansionary stance of monetary policy and some expected impetus from fiscal policy, IMF said in its World Economic Outlook report.

**Equity Markets:** Key equity benchmarks settled with modest gains, supported by firmness in index stocks. Trading was volatile as investors geared up for the upcoming Q4 March 2019 results beginning later this week. The Sensex rose 238.69 points or 0.62% to settle at 38,939.22. The Nifty 50 index rose 67.45 points or 0.58% to settle at 11,671.95.

**Corporate News:** Praj Industries announced that it has signed a construction license agreement (CLA) with Gevo, Inc, USA dated 4 April 2019, to commercialize technology for the production of Isobutanol using sugary-based feedstocks, such as juice, syrup and molasses. Pursuant to the CLA, Praj will provide engineering procurement and construction (EPC) services to 3rd parties using a process design package developed by Praj. This package uses Gevo's proprietary Isobutanol biocatalyst on sugary-based feedstock. Isobutanol derived from said proprietary process is high energy renewable intermediate product that finds application in aviation and racing cars. IndusInd Bank priced its maiden USD bond issuance in the offshore public markets. The bank raised \$400 million at a coupon rate of 3.875% per annum, payable semi-annually. Notes will be listed on Singapore SGX and the India INX, Gift City.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	17.4	235.4	235.4
MF(INR cr)	(465.4)	(204.5)	(204.5)

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,849	37,078	37,078
F&O(INR cr)	974,652	1,002,129	1,002,129

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.3	13.5	13.5
NSE VIX	20.3	18.9	18.9

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,114	0.9 %	(0.7) %	Energy	16,068	0.5 %	(2.8) %
IT	16,122	0.6 %	1.8 %	Pharma	9,333	1.0 %	(0.4) %
Metals	3,134	1.0 %	1.0 %	Finance	12,568	0.5 %	0.5 %
Auto	8,623	1.1 %	2.5 %	PSU	3,312	1.6 %	(2.2) %
FMCG	30,019	0.7 %	(0.6) %	Real Estate	274	1.4 %	2.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Ashok Leyl	92	5.1 %	1.5 %	Asian Pain	1,445	(3.4) %	(3.2) %
Yes Bank	271	4.1 %	(1.9) %	Indiabulls	832	(3.2) %	(1.8) %
Wipro	274	3.8 %	4.6 %	MRF	57,641	(2.2) %	(4.2) %
Tata Motor	99	2.7 %	7.4 %	Vodafone I	17	(2.0) %	(4.5) %
Tata Motor	206	2.7 %	9.9 %	Interglobe	1,391	(1.6) %	(1.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (APR)	10-04-2019	00:30	AUD	-	-
Westpac Consumer Confidence (APR)	10-04-2019	00:30	AUD	-	-
RBA's DeBelle Gives Speech in Adelaide	10-04-2019	02:30	AUD	-	-
ECB Deposit Facility Rate (APR 10)	10-04-2019	11:45	EUR	-	-
ECB Marginal Lending Facility (APR 10)	10-04-2019	11:45	EUR	-	-
European Central Bank Rate Decision (APR 10)	10-04-2019	11:45	EUR	-	-
ECB's Draghi Speaks in Frankfurt After Policy Decision	10-04-2019	12:30	EUR	-	-
ECB's Coeure Participates in Panel Discussion in Washington	10-04-2019	18:00	EUR	-	-
Construction Output SA (MoM) (FEB)	10-04-2019	08:30	GBP	-	-
Construction Output SA (YoY) (FEB)	10-04-2019	08:30	GBP	-	-
Gross Domestic Product (MoM) (FEB)	10-04-2019	08:30	GBP	-	-
Index of Services (3Mo3M) (FEB)	10-04-2019	08:30	GBP	-	-
Index of Services (MoM) (FEB)	10-04-2019	08:30	GBP	-	-
Industrial Production (MoM) (FEB)	10-04-2019	08:30	GBP	-	-
Industrial Production (YoY) (FEB)	10-04-2019	08:30	GBP	-	-
Manufacturing Production (MoM) (FEB)	10-04-2019	08:30	GBP	-	-
Manufacturing Production (YoY) (FEB)	10-04-2019	08:30	GBP	-	-
Monthly GDP 3M/3M Change (FEB)	10-04-2019	08:30	GBP	-	-
Trade Balance (FEB)	10-04-2019	08:30	GBP	-	(□3825m)
Trade Balance Non EU GBP/Mn (FEB)	10-04-2019	08:30	GBP	-	(□4977m)
Visible Trade Balance (Pounds) (FEB)	10-04-2019	08:30	GBP	-	(□13084m)
RICS House Price Balance (MAR)	10-04-2019	23:01	GBP	-	-
BOJ Outright Bond Purchase 5~10 Years	10-04-2019	01:10	JPY	-	-
Machine Tool Orders (YoY) (MAR P)	10-04-2019	06:00	JPY	-	-
BOJ Kuroda makes a speech at Trust Bank Assosiation anual meet	10-04-2019	06:15	JPY	-	-
Foreign Buying Japan Bonds (APR 05)	10-04-2019	23:50	JPY	-	□1570.6b
Foreign Buying Japan Stocks (APR 05)	10-04-2019	23:50	JPY	-	□438.7b
Japan Buying Foreign Bonds (Yen) (APR 05)	10-04-2019	23:50	JPY	-	□1243.5b
Japan Buying Foreign Stocks (Yen) (APR 05)	10-04-2019	23:50	JPY	-	□11.5b



Japan Money Stock M2+CD (YoY) (MAR)	10-04-2019	23:50	JPY	-	-
Japan Money Stock M3 (YoY) (MAR)	10-04-2019	23:50	JPY	-	-
Food Prices (MoM) (MAR)	10-04-2019	22:45	NZD	-	-
MBA Mortgage Applications (APR 05)	10-04-2019	11:00	USD	-	-
Consumer Price Index (MoM) (MAR)	10-04-2019	12:30	USD	-	-
Consumer Price Index (YoY) (MAR)	10-04-2019	12:30	USD	-	-
Consumer Price Index Core Index s.a. (MAR)	10-04-2019	12:30	USD	-	-
Consumer Price Index Ex Food and Energy (MoM) (MAR)	10-04-2019	12:30	USD	-	-
Consumer Price Index Ex Food and Energy (YoY) (MAR)	10-04-2019	12:30	USD	-	-
Consumer Price Index n.s.a. (MAR)	10-04-2019	12:30	USD	-	-
Real Avg Hourly Earning (YoY) (MAR)	10-04-2019	12:30	USD	-	-
Real Avg Weekly Earnings (YoY) (MAR)	10-04-2019	12:30	USD	-	-
DOE Cushing OK Crude Inventory (APR 05)	10-04-2019	14:30	USD	-	201k
DOE U.S. Crude Oil Inventories (APR 05)	10-04-2019	14:30	USD	-	7238k
DOE U.S. Distillate Inventory (APR 05)	10-04-2019	14:30	USD	-	(1998k)
DOE U.S. Gasoline Inventories (APR 05)	10-04-2019	14:30	USD	-	(1781k)
U.S. to Sell USD24 Bln 10-Year Notes Reopening	10-04-2019	17:00	USD	-	-
FOMC Meeting Minutes (MAR)	10-04-2019	18:00	USD	-	-
Monthly Budget Statement (MAR)	10-04-2019	18:00	USD	-	(\$234.0b)

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