



10 May.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,357	0.4 %	1.3 %
BSE SENSEX	29,933	0.0 %	0.5 %
CNX BANK	22,762	0.2 %	5.6 %
CNX MIDCAP	18,382	0.7 %	6.1 %
CNX SMALLCAP	7,638	0.6 %	8.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,976	(0.2) %	5.5 %
S&P 500	2,397	(0.1) %	6.2 %
FTSE 100	7,342	0.6 %	2.3 %
HANG SENG	24,889	1.3 %	12.4 %
NIKKEI	19,843	(0.3) %	1.3 %
SHANGHAI COMPOSITE	3,081	0.1 %	(1.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.63	0.4 %	(4.1) %
EUR/USD	1.09	(0.9) %	2.8 %
GBP/USD	1.30	(0.2) %	5.3 %
USD/JPY	113.90	1.1 %	(1.8) %
USD/AUD	1.36	0.9 %	(0.6) %
USD/SGD	1.41	0.4 %	(1.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	(1.2) %	(12.3) %
Gold(INR/10g)	28,100	(0.2) %	1.0 %
Gold Comex(USD/oz)	1,223	(0.4) %	5.6 %
SILVER(INR/1Kg)	37,744	(0.3) %	(3.0) %
Aluminium(USD/MT)	1,874	(0.3) %	10.1 %
Copper(USD/MT)	5,496	0.5 %	(1.4) %

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 Asia and Pacific region continues to deliver strong growth, in the face of widespread concerns about growing protectionism, a rapidly ageing society, and slow productivity growth, according to the IMF's latest regional assessment, as per IMF Regional Economic Outlook for Asia and the Pacific. The Regional Economic Outlook for Asia and the Pacific estimates growth for the region to increase this year to 5.5% from 5.3% in 2016. Growth will remain strong at 5.4% in 2018, as the region continues to be the leader of global growth. The report also cites the more favourable global environment with growth accelerating in many major advanced and emerging market economies notably the United States and commodity exporters as supporting Asia's positive outlook. Risk appetite remains strong in global financial markets despite some bouts of capital flow volatility in late 2016.

Global Equities: US stocks witnessed mixed sentiments. While the Dow and the S&P 500 pulled back into negative territory, the tech-heavy Nasdaq reached a new record closing high.

Indian Economy: As per Third Advance Estimates for 2016-17, total Foodgrain production in the country is estimated at 273.38 million tonnes which is higher by 8.34 million tonnes (3.15%) than the previous record production of Foodgrain of 265.04 million tonnes achieved during 2013-14. The current year's production is also higher by 16.37 million tonnes (6.37%) than the previous five years' (2011-12 to 2015-16) average production of Foodgrains. The current year's production is significantly higher by 21.81 million tonnes (8.67%) than the last year's foodgrain production.

Equity Markets: Key benchmark indices settled near the flat line after hovering in a range-bound and listless session of trade. The Sensex settled below the psychological 30,000 mark after regaining that mark intermittently in intraday trade.

Corporate News: InterGlobe Aviation's net profit fell 24.6% to Rs 440.30 crore on 18.5% growth in revenue from operations to Rs 4848.21 crore in Q4 March 2017 over Q4 March 2016. The company earnings before interest, taxation, depreciation, amortization and rent costs (EBITDAR) declined 6.6% to Rs 1449.16 crore in Q4 March 2017 over Q4 March 2016. EBITDAR margin contracted to 29.9% in Q4 March 2017, from 37.9% in Q4 March 2016. The result was announced after market hours yesterday, 9 May 2017. InterGlobe Aviation's board recommended a final dividend of Rs 34 per share for the year ended March 2017 (FY 2017). On a consolidated basis, Bharti Airtel's net profit fell 69.22% to Rs 470.60 crore on 12.12% decline in net sales to Rs 21934.60 crore in Q4 March 2017 over Q4 March 2016. Drug major Lupin clarified to the media news after market hours yesterday, 9 May 2017. The company said that recently its Aurangabad facility underwent an inspection by the US Food and Drug Administration (USFDA). The inspection was completed on 26 April 2017, subsequent to which, the USFDA issued Form 483 citing eight observations. The company is in the midst of putting together a response to address the observations. Sintex Industries said that the foreign currency convertible bonds (FCCB) Committee of its board of directors allotted 47.56 lakh equity shares to FCCB holders on the exercise of their conversion right.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(90.5)	(43.5)	(24.4)
MF(INR cr)	229.1	600.2	620.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,519	29,653	30,212
F&O(INR cr)	330,638	420,057	499,168

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.0	10.3	12.4
NSE VIX	11.1	11.5	11.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	22,707	(0.3) %	5.4 %	Energy	11,981	0.6 %	1.4 %
IT	10,280	0.7 %	(2.9) %	Pharma	9,998	(0.2) %	(4.8) %
Metals	2,876	0.8 %	(7.4) %	Finance	9,166	(0.2) %	3.9 %
Auto	10,158	(0.1) %	2.4 %	PSU	3,742	(1.3) %	6.1 %
FMCG	23,528	0.4 %	(0.5) %	Real Estate	267	0.5 %	21.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Godrej Con	1,929	10.0 %	13.8 %	Titan Comp	467	(3.6) %	1.7 %
A B B	1,532	9.0 %	16.0 %	Hero Motoc	3,282	(3.5) %	2.5 %
Siemens	1,448	7.1 %	11.2 %	Indiabulls	1,086	(3.0) %	9.0 %
I O C L	441	2.9 %	15.6 %	LIC Housin	683	(3.0) %	9.2 %
Hind.Zinc	254	2.5 %	(12.9) %	Lupin	1,250	(2.3) %	(12.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (YoY) (APR)	10-05-2017	1:30	CNY	-	0.009
Producer Price Index (YoY) (APR)	10-05-2017	1:30	CNY	-	0.076
ECB's Draghi Speaks in Dutch Parliament	10-05-2017	11:00	EUR	-	-
RICS House Price Balance (APR)	10-05-2017	23:01	GBP	-	0.22
Adjusted Current Account Total (Yen) (MAR)	10-05-2017	23:50	JPY	-	-
Bank Lending Banks ex-Trust (APR)	10-05-2017	23:50	JPY	-	0.03
Bank Lending incl Trusts (YoY) (APR)	10-05-2017	23:50	JPY	-	0.03
Coincident Index (MAR P) (MAR P)	10-05-2017	5:00	JPY	-	115.3
Current Account Total (Yen) (MAR)	10-05-2017	23:50	JPY	-	-
Foreign Buying Japan Bonds (Yen) (MAY 05)	10-05-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (MAY 05)	10-05-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAY 05)	10-05-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAY 05)	10-05-2017	23:50	JPY	-	-
Leading Index (MAR P) (MAR P)	10-05-2017	5:00	JPY	-	104.8
Trade Balance - BOP Basis (Yen) (MAR)	10-05-2017	23:50	JPY	-	-
Food Prices (MoM) (APR)	10-05-2017	22:45	NZD	-	(0.003)
RBNZ's Wheeler news conference on policy statement	10-05-2017	22:00	NZD	-	-
Reserve Bank of New Zealand Rate Decision (MAY 11)	10-05-2017	21:00	NZD	-	0.0175
DOE Cushing OK Crude Inventory (MAY 05)	10-05-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAY 05)	10-05-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (MAY 05)	10-05-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (MAY 05)	10-05-2017	14:30	USD	-	-
Export Price Index (MoM) (APR)	10-05-2017	12:30	USD	-	0.002
Export Price Index (YoY) (APR)	10-05-2017	12:30	USD	-	0.036
Fed's Rosengren to Speak on Economy at Vermont Business Group	10-05-2017	16:00	USD	-	-
Import Price Index (MoM) (APR)	10-05-2017	12:30	USD	-	(0.002)
Import Price Index (YoY) (APR)	10-05-2017	12:30	USD	-	0.042
Import Price Index ex Petroleum (MoM) (APR)	10-05-2017	12:30	USD	-	0.002
NPA Meeting Applications (MAY 05)	10-05-2017	11:00	USD	-	(0.001)



Monthly Budget Statement (APR)
U.S. to Sell USD23 Bln 10-Year Notes

10-05-2017 18:00
10-05-2017 17:00

USD
USD

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