



10 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,737	(0.0) %	5.1 %
BSE SENSEX	35,319	0.3 %	6.2 %
CNX BANK	26,167	0.0 %	7.6 %
CNX MIDCAP	19,492	(1.2) %	2.1 %
CNX SMALLCAP	8,187	(1.0) %	3.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,543	0.8 %	(1.1) %
S&P 500	2,698	1.0 %	0.1 %
FTSE 100	7,663	1.3 %	0.2 %
HANG SENG	30,536	0.4 %	0.1 %
NIKKEI	22,409	(0.4) %	(4.7) %
SHANGHAI COMPOSITE	3,159	(0.1) %	(5.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.28	0.3 %	5.7 %
EUR/USD	1.19	0.2 %	(1.2) %
GBP/USD	1.36	0.3 %	0.4 %
USD/JPY	109.66	0.1 %	(2.7) %
USD/AUD	1.34	(0.5) %	4.7 %
USD/SGD	1.34	0.0 %	0.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	3.0 %	17.8 %
Gold(INR/10g)	31,143	0.2 %	6.1 %
Gold Comex(USD/oz)	1,314	0.2 %	0.4 %
SILVER(INR/1Kg)	39,374	0.4 %	2.0 %
Aluminium(USD/MT)	2,295	(3.7) %	1.7 %
Copper(USD/MT)	6,786	1.0 %	(5.5) %

FIXED INCOME

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

Global Economy: The European Bank for Reconstruction and Development raised its economic forecasts for 2018 citing strong investment and higher exports. According to Regional Economic Prospects, the EBRD economies will grow 3.3% this year instead of 3% projected in November. However, this was slower than the 3.8% growth estimated for 2017 due to lower rates of productivity growth in advanced and emerging economies. Growth is forecast to decelerate further to 3.2% in 2019. The EBRD observed that a substantial rise in corporate debt levels was a source of concern. Japan's leading index, which measures the future economic activity, dropped to 105.0 in March from 105.9 in February, preliminary figures from the Cabinet Office showed. Meanwhile, the coincident index that reflects the current economic activity improved to 116.4 in March from 116.0 in the preceding month. The lagging index came in at 118.0 in March versus 118.4 in February.

Global Equities: European stocks rose on Wednesday as rallying oil prices helped lift energy stocks and sound economic growth estimates also remained in focus.

Indian Economy: The Indian economy is expected to grow at 7.4% in the current fiscal and accelerate further to 7.8% as it recovers from the impact of demonetisation and GST roll out, IMF said in its Regional Economic Outlook: Asia and Pacific.

Equity Markets: Key benchmark indices logged modest gains on steady buying in index pivots. After opening with an upward gap, stocks continued to gain momentum as the day's trading session progressed. Most IT shares rose as the rupee weakened against the dollar. Capital goods stocks saw mixed trend. Tata Motors surged after good JLR sales in April.

Corporate News: The major ports in India have recorded a growth of 1.78% and together handled 56.81 Million Tonnes of cargo during the period April 2018 as against 55.82 Million Tonnes handled during the corresponding period of previous year. The highest growth was registered by Kolkata (12.56%), followed by Kamarajar (12.08%), New Mangalore (11.41%), Paradip (11.12%) and Chennai (7.55%). Federal Bank reported a 43.5 percent year-on-year (YoY) drop in net profit at Rs 145 crore for the March quarter because of an increase in provisions and worsening asset quality. Net profit in the same quarter last year had shot up 2,400 percent to Rs 256.6 crore due to substantially lower provisions and reduction in non-performing assets (NPAs). Slippages were to the tune of Rs 872 crore for the fourth quarter, of which Rs 492 crore was from one account, said the bank. EID Parry posted 86.43% drop in consolidated net profit at Rs 40.48 crore for the January-March quarter of 2017-18 fiscal. Total income declined marginally to Rs 3,378.43 crore in January-March 2018 from Rs 3,478.25 crore in the year-ago period. However, the company's expenditure increased to Rs 3,284.30 crore from Rs 3,161.14 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	54.2	(67.5)	(50.8)
MF(INR cr)	294.1	178.0	459.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,153	34,870	34,159
F&O(INR cr)	650,877	633,326	719,266

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	15.0	17.5
NSE VIX	14.3	13.5	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,154	0.2 %	7.5 %	Energy	13,921	0.3 %	4.7 %
IT	13,453	0.6 %	5.9 %	Pharma	8,704	(0.6) %	1.0 %
Metals	3,692	0.1 %	4.3 %	Finance	10,867	0.0 %	5.9 %
Auto	11,420	(0.2) %	3.3 %	PSU	2,855	(0.7) %	0.0 %
FMCG	28,436	(0.4) %	7.3 %	Real Estate	317	(0.1) %	6.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	197	3.9 %	4.2 %	Godrej Con	1,090	(3.0) %	(2.3) %
Tata Motor	342	3.0 %	0.8 %	UltraTech	3,966	(2.4) %	(0.3) %
Cummins In	775	2.0 %	8.3 %	Ambuja Cem	225	(2.1) %	(6.5) %
ICICI Pru	450	1.9 %	17.0 %	Ashok Leyl	162	(2.1) %	9.5 %
Titan Comp	986	1.8 %	4.4 %	Interglobe	1,171	(2.1) %	(11.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (MAY)	10-05-2018	1:00	AUD	-	0.036
New Housing Price Index (MoM) (MAR)	10-05-2018	12:30	CAD	-	(0.002)
New Housing Price Index (YoY) (MAR)	10-05-2018	12:30	CAD	-	0.026
Consumer Price Index (YoY) (APR)	10-05-2018	1:30	CNY	-	0.021
Producer Price Index (YoY) (APR)	10-05-2018	1:30	CNY	-	0.031
ECB Publishes Economic Bulletin	10-05-2018	8:00	EUR	-	-
Bank of England Bank Rate (MAY 10)	10-05-2018	11:00	GBP	-	0.005
Bank of England Inflation Report	10-05-2018	11:00	GBP	-	-
BOE Asset Purchase Target (MAY)	10-05-2018	11:00	GBP	-	-
BOE Corporate Bond Target (MAY)	10-05-2018	11:00	GBP	-	-
NIESR Gross Domestic Product Estimate (APR)	10-05-2018	11:00	GBP	-	0.002
Construction Output SA (MoM) (MAR)	10-05-2018	8:30	GBP	-	(0.016)
Construction Output SA (YoY) (MAR)	10-05-2018	8:30	GBP	-	(0.03)
Industrial Production (MoM) (MAR)	10-05-2018	8:30	GBP	-	0.001
Industrial Production (YoY) (MAR)	10-05-2018	8:30	GBP	-	0.022
Manufacturing Production (MoM) (MAR)	10-05-2018	8:30	GBP	-	(0.002)
Manufacturing Production (YoY) (MAR)	10-05-2018	8:30	GBP	-	0.025
Trade Balance (MAR)	10-05-2018	8:30	GBP	-	-
Trade Balance Non EU GBP/Mn (MAR)	10-05-2018	8:30	GBP	-	-
Visible Trade Balance (Pounds) (MAR)	10-05-2018	8:30	GBP	-	-
Japan Money Stock M2+CD (YoY) (APR)	10-05-2018	23:50	JPY	-	0.032
Japan Money Stock M3 (YoY) (APR)	10-05-2018	23:50	JPY	-	0.028
Bankruptcies (YoY) (APR)	10-05-2018	4:30	JPY	-	0.0038
RBNZ's Orr at Parliament Select Committee on MPS	10-05-2018	1:10	NZD	-	-
BusinessNZ Manufacturing PMI (APR)	10-05-2018	22:30	NZD	-	52.2
Food Prices (MoM) (APR)	10-05-2018	22:45	NZD	-	0.01
Consumer Price Index (MoM) (APR)	10-05-2018	12:30	USD	-	(0.001)
Consumer Price Index (YoY) (APR)	10-05-2018	12:30	USD	-	0.024
Consumer Price Index Core Inflation (APR)	10-05-2018	12:30	USD	-	0.024



Consumer Price Index Ex Food and Energy (MoM) (APR)	10-05-2018	12:30	USD	-	0.002
Consumer Price Index Ex Food and Energy (YoY) (APR)	10-05-2018	12:30	USD	-	0.021
Consumer Price Index n.s.a. (APR)	10-05-2018	12:30	USD	-	249.554
Continuing Claims (APR 28)	10-05-2018	12:30	USD	-	-
Initial Jobless Claims (MAY 5)	10-05-2018	12:30	USD	-	-
Real Avg Hourly Earning (YoY) (APR)	10-05-2018	12:30	USD	-	0.004
Real Avg Weekly Earnings (YoY) (APR)	10-05-2018	12:30	USD	-	0.009
EIA Natural Gas Storage Change (MAY 4)	10-05-2018	14:30	USD	-	62
EIA Working Natural Gas Implied Flow (MAY 4)	10-05-2018	14:30	USD	-	62
U.S. to Sell USD17 Bln 30-Year Notes	10-05-2018	17:00	USD	-	-
Monthly Budget Statement (APR)	10-05-2018	18:00	USD	-	-

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