



10 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,314	0.1 %	(3.0) %
BSE SENSEX	37,559	(0.6) %	(3.1) %
CNX BANK	28,928	0.1 %	(4.6) %
CNX MIDCAP	16,964	0.1 %	(7.5) %
CNX SMALLCAP	6,245	0.2 %	(7.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,828	(0.5) %	10.7 %
S&P 500	2,871	(0.3) %	14.5 %
FTSE 100	7,207	(0.9) %	7.0 %
HANG SENG	28,311	(2.4) %	12.7 %
NIKKEI	21,402	(0.9) %	9.4 %
SHANGHAI COMPOSITE	2,851	(1.5) %	15.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.97	0.7 %	0.8 %
EUR/USD	1.12	0.1 %	(2.1) %
GBP/USD	1.30	(0.6) %	2.1 %
USD/JPY	109.79	(0.7) %	0.2 %
USD/AUD	1.43	0.5 %	0.8 %
USD/SGD	1.36	0.1 %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	0.9 %	32.6 %
Gold(INR/10g)	31,730	(0.1) %	0.6 %
Gold Comex(USD/oz)	1,285	0.2 %	(0.5) %
SILVER(INR/1Kg)	37,101	(0.3) %	(3.0) %
Aluminium(USD/MT)	1,767	0.3 %	(4.9) %
Copper(USD/MT)	6,112	0.1 %	4.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	0.0 %	(0.2) %

Global Economy: US trade deficit widened to \$50.0 billion in March from a revised \$49.3 billion in February, the Commerce Department reported on Thursday. The wider trade deficit came as the value of imports surged up by 1.1% to \$262.0 billion in March from \$259.2 billion in February. The report said the value of exports jumped by 1% to \$212.0 billion in March from \$209.9 billion in February. China's consumer price inflation edged up to a six-month high in April, while producer price inflation increased at the fastest pace in four months, data from the National Bureau of Statistics revealed today. The consumer price index rose 2.5% year-on-year, following a 2.3% increase in March. The producer price index also rose an annual 0.9% in the month, following a 0.4% gain in March. Japan's consumer confidence weakened to the lowest level in more than three years in April, data from the Cabinet Office showed on Thursday. The consumer confidence index for households with two or more persons fell to a seasonally adjusted 40.4 in April from 40.5 in March. According to the Royal Institute of Chartered Surveyors (RICS) sentiment survey, the balance between the proportion of surveyors seeing house prices rise to those seeing a fall in April has remained unchanged at -23%. This is in line with recently released government numbers which suggest average prices in the UK grew by a marginal 0.6% in February compared to a year earlier - the smallest rise since September 2012.

Global Equities: Stocks retreated amid fears that the US-China conflict could escalate. After U.S. President Donald Trump threatened to levy additional tariffs on Chinese goods, Beijing said it would retaliate with necessary countermeasures in response.

Indian Economy: The Financial Year has begun on a negative note for local auto industry as all categories of vehicle registered de-growth, noted the Federation of Automobile Dealers Associations (FADA) yesterday as it released the Monthly Vehicle Registration Data for April'19. Despite temporary uptick in March retails and April retail figures being above the lowest month of Feb in this CY, overall consumer sentiments continue to remain weak. Dealer inventory continues to remain high and unlike March, no substantial reduction is seen across any segment. FADA strongly advocates for 21-days of Inventory for Sustained Dealer Viability. Dealer Liquidity and access to Working Capital remains negative and is a matter of grave concern.

Equity Markets: Key equity benchmarks dropped for seventh straight trading session, dragged by index heavyweight Reliance Industries. Negative global stocks weighed on the sentiment amid concerns that the US and China would struggle to reach an agreement. The Sensex fell 230.22 points or 0.61% to settle at 37,558.91, its lowest closing level since 12 March 2019. The Nifty 50 index fell 57.65 points or 0.51% to settle at 11,301.80, its lowest closing level since 12 March 2019 as well.

Corporate News: Reliance Industries said that its subsidiary, Reliance Brands (RBL), and C Banner International Holdings, a Hong Kong-listed company, signed a definitive agreement for Reliance Brands to acquire 100% shares of Hamleys Global Holdings, the owner of the Hamleys brand, from C Banner International, for a cash consideration of GBP 67.96 million. HCL Technologies reported a consolidated net profit of Rs 2,568 crore for the fourth quarter ended March 2019. The company posted a net profit of Rs 2,341.10 crore in the same quarter last year. The company declared an interim dividend of Rs 2 per equity share of Rs 2 each of the company for the financial year 2019-20.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(110.3)	81.0	138.6
MF(INR cr)	456.8	290.9	(131.0)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,099	22,414	31,984
F&O(INR cr)	2,148,920	1,333,145	1,222,166

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.1	16.8	13.8
NSE VIX	25.5	25.3	22.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,885	(0.4) %	(4.8) %	Energy	15,635	(1.8) %	(5.4) %
IT	16,133	0.4 %	1.8 %	Pharma	8,977	(0.3) %	(4.3) %
Metals	2,917	(1.4) %	(6.0) %	Finance	12,174	(0.3) %	(2.6) %
Auto	8,104	0.1 %	(3.7) %	PSU	2,947	0.2 %	(12.9) %
FMCG	29,475	0.3 %	(2.4) %	Real Estate	251	0.3 %	(6.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	358	7.9 %	(17.1) %	A B B	1,386	(4.7) %	5.2 %
Yes Bank	170	5.9 %	(38.3) %	Reliance I	1,256	(3.3) %	(9.7) %
ICICI Lomb	1,091	3.0 %	7.4 %	B P C L	368	(3.1) %	(6.1) %
Bajaj Fin.	2,971	1.7 %	(1.0) %	Bharti Air	315	(2.8) %	0.8 %
L&T Fin.Ho	121	1.7 %	(20.6) %	Coal India	242	(2.7) %	2.5 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Statement on Monetary Policy (MAY)	10-05-2019	01:30	AUD	-	-
Building Permits (MoM) (MAR)	10-05-2019	12:30	CAD	-	(0.057)
Full Time Employment Change (APR)	10-05-2019	12:30	CAD	-	-
Hourly Wage Rate Permanent Employees (YoY) (APR)	10-05-2019	12:30	CAD	-	0.023
Net Change in Employment (APR)	10-05-2019	12:30	CAD	-	-
Part Time Employment Change (APR)	10-05-2019	12:30	CAD	-	(0.9)
Participation Rate (APR)	10-05-2019	12:30	CAD	-	65.7
Unemployment Rate (APR)	10-05-2019	12:30	CAD	-	0.058
German Current Account (euros) (MAR)	10-05-2019	06:00	EUR	-	-
German Exports s.a. (MoM) (MAR)	10-05-2019	06:00	EUR	-	(0.013)
German Imports s.a. (MoM) (MAR)	10-05-2019	06:00	EUR	-	(0.016)
German Trade Balance (MAR)	10-05-2019	06:00	EUR	-	-
ECB's Lautenschlaeger Speaks in Paris	10-05-2019	07:30	EUR	-	-
ECB's Coeure Speaks in Paris	10-05-2019	14:30	EUR	-	-
Construction Output SA (MoM) (MAR)	10-05-2019	08:30	GBP	-	0.004
Construction Output SA (YoY) (MAR)	10-05-2019	08:30	GBP	-	0.033
Exports (1Q P)	10-05-2019	08:30	GBP	-	0.016
Government Spending (1Q P)	10-05-2019	08:30	GBP	-	0.013
Gross Domestic Product (MoM) (MAR)	10-05-2019	08:30	GBP	-	0.002
Gross Domestic Product (QoQ) (1Q P)	10-05-2019	08:30	GBP	-	0.002
Gross Domestic Product (YoY) (1Q P)	10-05-2019	08:30	GBP	-	0.014
Gross Fixed Capital Formation (1Q P)	10-05-2019	08:30	GBP	-	(0.006)
Imports (1Q P)	10-05-2019	08:30	GBP	-	0.021
Index of Services (3Mo3M) (MAR)	10-05-2019	08:30	GBP	-	0.004
Index of Services (MoM) (MAR)	10-05-2019	08:30	GBP	-	0.001
Industrial Production (MoM) (MAR)	10-05-2019	08:30	GBP	-	0.006
Industrial Production (YoY) (MAR)	10-05-2019	08:30	GBP	-	0.001
Manufacturing Production (MoM) (MAR)	10-05-2019	08:30	GBP	-	0.009
Manufacturing Production (YoY) (MAR)	10-05-2019	08:30	GBP	-	0.006



Private Consumption (1Q P)	10-05-2019	08:30	GBP	-	0.003
Total Business Investment (QoQ) (1Q P)	10-05-2019	08:30	GBP	-	(0.009)
Total Business Investment (YoY) (1Q P)	10-05-2019	08:30	GBP	-	(0.025)
Trade Balance (MAR)	10-05-2019	08:30	GBP	-	-
Trade Balance Non EU GBP/Mn (MAR)	10-05-2019	08:30	GBP	-	-
Visible Trade Balance (Pounds) (MAR)	10-05-2019	08:30	GBP	-	-
Industrial Production NSA (YoY) (MAR)	10-05-2019	13:00	MXN	-	(0.008)
Brainard Speaks at Fed Community Development Conference	10-05-2019	12:30	USD	-	-
Consumer Price Index (MoM) (APR)	10-05-2019	12:30	USD	-	0.004
Consumer Price Index (YoY) (APR)	10-05-2019	12:30	USD	-	0.019
Consumer Price Index Core Index s.a. (APR)	10-05-2019	12:30	USD	-	261.374
Consumer Price Index Ex Food and Energy (MoM) (APR)	10-05-2019	12:30	USD	-	0.001
Consumer Price Index Ex Food and Energy (YoY) (APR)	10-05-2019	12:30	USD	-	0.02
Consumer Price Index n.s.a. (APR)	10-05-2019	12:30	USD	-	254.202
Real Avg Hourly Earning (YoY) (APR)	10-05-2019	12:30	USD	-	0.013
Real Avg Weekly Earnings (YoY) (APR)	10-05-2019	12:30	USD	-	0.013
Fed's Bostic Discusses Economic Outlook	10-05-2019	13:08	USD	-	-
Fed's Williams Speaks to Bronx Bankers Breakfast	10-05-2019	14:00	USD	-	-
Baker Hughes U.S. Rig Count (MAY 10)	10-05-2019	17:00	USD	-	990
Monthly Budget Statement (APR)	10-05-2019	18:00	USD	-	-

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