



11 Apr.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,402	(0.0) %	1.9 %
BSE SENSEX	33,880	0.3 %	1.9 %
CNX BANK	25,101	(0.5) %	3.2 %
CNX MIDCAP	19,618	(0.1) %	2.7 %
CNX SMALLCAP	8,206	(0.1) %	3.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,408	1.8 %	(1.7) %
S&P 500	2,657	1.7 %	(1.4) %
FTSE 100	7,267	1.0 %	(5.0) %
HANG SENG	30,729	1.7 %	0.7 %
NIKKEI	21,794	0.5 %	(7.3) %
SHANGHAI COMPOSITE	3,190	1.7 %	(4.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.99	0.0 %	2.1 %
EUR/USD	1.24	0.6 %	2.9 %
GBP/USD	1.42	0.6 %	4.9 %
USD/JPY	107.09	0.1 %	(5.0) %
USD/AUD	1.29	(0.9) %	0.9 %
USD/SGD	1.31	(0.5) %	(1.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	3.3 %	8.5 %
Gold(INR/10g)	30,624	0.3 %	4.3 %
Gold Comex(USD/oz)	1,344	0.5 %	2.7 %
SILVER(INR/1Kg)	38,212	0.5 %	(1.0) %
Aluminium(USD/MT)	2,172	2.8 %	(3.7) %
Copper(USD/MT)	6,888	1.8 %	(4.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.3 %

**Global Economy:** UK permanent staff placements increased sharply in March, while temporary billing growth eased to a 13-month low, the Report on Jobs published by IHS Markit and the Recruitment & Employment Confederation showed Tuesday. There was a sharp growth in permanent staff placements with the pace of growth rising fractionally since February. However, temp billings grew at the weakest pace over a year. Demand for staff grew at the softest pace for 15 months due to a weaker upturn in temporary staff positions. Australia's business conditions weakened in March from record highs, survey data from National Australia Bank showed. The business conditions index fell to +14 in March from 20 from February. The business confidence index came in at 7 in March, down from 9 in February.

**Global Equities:** European shares rose on Tuesday, led higher by gains in Bayer after a report that the US approved its takeover of Monsanto, while a solid update from LVMH lifted luxury sector stocks.

**Indian Economy:** Domestic passenger vehicle sales were surged 6.38% to 3,00,722 units in March as against 2,82,698 units in the same month last year. Car sales were marginally up at 1,91,082 units last month as against 1,90,236 units in March last year, according to the data released by the Society of Indian Automobile Manufacturers (SIAM). Motorcycle sales last month jumped by 25% to 11,45,221 units compared to 9,15,259 units in March 2017. Total two-wheeler sales in March were higher by 18.35% to 17,41,649 units. Sales of commercial vehicles also spurted by 24.55% to 1,08,681 units in March. Vehicle sales across categories registered 18.23% jump to 22,23,517 units. For the fiscal ended March 31, domestic passenger vehicles sales were at 32,87,965 units as against 30,47,582 units in the previous year, up nearly 8%. Car sales for 2017-18 were at 21,73,950 units as against 21,03,847 units in 2016-17, recording a steady increase of 3.33%.

**Equity Markets:** Local equity indices logged modest gains in steady session of trade on firm global cues. Shares across the globe edged higher after a speech by Chinese President Xi Jinping calmed investor jitters over an escalating US-China trade row. Domestic stocks logged gains for the fourth day in a row and the Sensex settled at over four-week high. The market opened higher and hit fresh intraday high in morning trade. Indices pared gains in mid-morning trade as profit selling emerged at higher levels. The market turned range bound since early afternoon trade and ended with decent gains.

**Corporate News:** Infosys would be in focus after Calix announced a strategic multi-year partnership with Infosys that will accelerate communications service provider (CSP) adoption of AXOS, its Software Defined Access (SDA) Platform. Calix and Infosys will jointly invest to co-create new services and value-added offerings on the award winning AXOS platform. A spurt in oil prices can weigh on the local Oil Marketing Companies today after their recent recovery. Employees in India are expected to get an average salary hike of 9.6% this financial year, according to a report from KPMG, noted media reports yesterday. Ratings Agency Fitch has downgraded the viability rating of Punjab National Bank to 'bb-' from 'bb' and has maintained its negative watch.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(197.8)	(32.9)	(32.9)
MF(INR cr)	983.8	315.0	315.0

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,763	32,613	32,613
F&O(INR cr)	522,641	636,640	636,640

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.8	21.6	21.6
NSE VIX	14.5	15.1	15.1

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,227	0.5 %	3.7 %	Energy	13,637	0.2 %	2.6 %
IT	12,577	0.4 %	(1.0) %	Pharma	8,720	(0.2) %	1.1 %
Metals	3,683	2.0 %	4.1 %	Finance	10,541	0.1 %	2.7 %
Auto	11,387	(0.7) %	3.0 %	PSU	3,065	0.7 %	7.4 %
FMCG	27,103	(0.0) %	2.3 %	Real Estate	307	1.1 %	3.4 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Axis Bank	546	5.2 %	9.4 %	Bajaj Fins	5,413	(2.7) %	2.8 %
Hindalco I	230	3.9 %	8.9 %	Hero Motoc	3,718	(2.1) %	2.0 %
NMDC	123	3.6 %	4.8 %	Rural Elec	129	(2.1) %	0.4 %
Avenue Sup	1,489	3.4 %	9.7 %	Motherson	340	(1.7) %	5.2 %
DLF	213	3.3 %	5.9 %	Indiabulls	1,325	(1.6) %	6.5 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Governor Lowe Speaks in Perth	11-04-2018	3:05	AUD	-	-
Westpac Consumer Conf Index (Apr)	11-04-2018	0:30	AUD	-	-
Westpac Consumer Confidence (Apr)	11-04-2018	0:30	AUD	-	-
Consumer Price Index (YoY) (Mar)	11-04-2018	1:30	CNY	-	-
PBOC Governor Yi Gang speaks at Boao Forum, China	11-04-2018	1:00	CNY	-	-
Producer Price Index (YoY) (Mar)	11-04-2018	1:30	CNY	-	-
ECB's Draghi Speaks in Frankfurt	11-04-2018	11:00	EUR	-	-
Construction Output SA (MoM) (Feb)	11-04-2018	8:30	GBP	-	-
Construction Output SA (YoY) (Feb)	11-04-2018	8:30	GBP	-	-
Industrial Production (MoM) (Feb)	11-04-2018	8:30	GBP	-	-
Industrial Production (YoY) (Feb)	11-04-2018	8:30	GBP	-	-
Manufacturing Production (MoM) (Feb)	11-04-2018	8:30	GBP	-	-
Manufacturing Production (YoY) (Feb)	11-04-2018	8:30	GBP	-	-
NIESR Gross Domestic Product Estimate (Mar)	11-04-2018	11:00	GBP	-	-
RICS House Price Balance (Mar)	11-04-2018	23:01	GBP	-	-
Trade Balance (Feb)	11-04-2018	8:30	GBP	-	(□3074)
Trade Balance Non EU GBP/Mn (Feb)	11-04-2018	8:30	GBP	-	(□3868)
Visible Trade Balance (Pounds) (Feb)	11-04-2018	8:30	GBP	-	(□12325)
BOJ Outright Bond Purchase 1~3 Years	11-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	11-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	11-04-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (Apr 6)	11-04-2018	23:50	JPY	-	□268.9b
Foreign Buying Japan Stocks (Apr 6)	11-04-2018	23:50	JPY	-	□228.8b
Japan Buying Foreign Bonds (Yen) (Apr 6)	11-04-2018	23:50	JPY	-	(□774.3b)
Japan Buying Foreign Stocks (Yen) (Apr 6)	11-04-2018	23:50	JPY	-	□173.1b
Japan Money Stock M2+CD (YoY) (Mar)	11-04-2018	23:50	JPY	-	-
Japan Money Stock M3 (YoY) (Mar)	11-04-2018	23:50	JPY	-	-
Card Spending Retail (MoM) (Mar)	11-04-2018	22:45	NZD	-	-
NZ Card Spending (MoM) (Mar)	11-04-2018	22:45	NZD	-	-



Consumer Price Index (MoM) (Mar)	11-04-2018	12:30	USD	-	-
Consumer Price Index (YoY) (Mar)	11-04-2018	12:30	USD	-	-
Consumer Price Index Core Index s.a. (Mar)	11-04-2018	12:30	USD	-	-
Consumer Price Index Ex Food and Energy (MoM) (Mar)	11-04-2018	12:30	USD	-	-
Consumer Price Index Ex Food and Energy (YoY) (Mar)	11-04-2018	12:30	USD	-	-
Consumer Price Index n.s.a. (Mar)	11-04-2018	12:30	USD	-	-
DOE Cushing OK Crude Inventory (Apr 6)	11-04-2018	14:30	USD	-	3666k
DOE U.S. Crude Oil Inventories (Apr 6)	11-04-2018	14:30	USD	-	(4617k)
DOE U.S. Distillate Inventory (Apr 6)	11-04-2018	14:30	USD	-	537k
DOE U.S. Gasoline Inventories (Apr 6)	11-04-2018	14:30	USD	-	(1116k)
FOMC Meeting Minutes (Mar 21)	11-04-2018	18:00	USD	-	-
MBA Mortgage Applications (Apr 6)	11-04-2018	11:00	USD	-	-
Monthly Budget Statement (Mar)	11-04-2018	18:00	USD	-	(\$215.2b)
Real Avg Hourly Earning (YoY) (Mar)	11-04-2018	12:30	USD	-	-
Real Avg Weekly Earnings (YoY) (Mar)	11-04-2018	12:30	USD	-	-
U.S. to Sell USD21 Bln 10-Year Notes Reopening	11-04-2018	17:00	USD	-	-

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