



11 Apr.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,584	0.0 %	(0.7) %
BSE SENSEX	38,585	(0.9) %	(0.6) %
CNX BANK	29,804	0.0 %	(1.7) %
CNX MIDCAP	18,076	0.0 %	(1.4) %
CNX SMALLCAP	6,677	0.0 %	(0.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,157	0.0 %	12.1 %
S&P 500	2,888	0.4 %	15.2 %
FTSE 100	7,422	(0.1) %	10.2 %
HANG SENG	30,120	(0.1) %	19.9 %
NIKKEI	21,688	(0.5) %	10.9 %
SHANGHAI COMPOSITE	3,242	0.1 %	31.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.27	(0.4) %	(0.2) %
EUR/USD	1.13	0.2 %	(1.6) %
GBP/USD	1.31	0.2 %	2.6 %
USD/JPY	111.08	(0.4) %	1.3 %
USD/AUD	1.40	(0.5) %	(1.6) %
USD/SGD	1.35	(0.2) %	(0.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	1.0 %	38.8 %
Gold(INR/10g)	31,907	0.1 %	1.2 %
Gold Comex(USD/oz)	1,307	0.4 %	1.2 %
SILVER(INR/1Kg)	37,670	(0.3) %	(1.6) %
Aluminium(USD/MT)	1,852	0.1 %	(0.3) %
Copper(USD/MT)	6,447	(0.8) %	10.4 %

**FIXED INCOME**

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

**Global Economy:** The Minutes of latest US Federal Reserve policy meeting suggested the central bank no longer expects to raise interest rates this year. The minutes said a majority of meeting participants expected that the evolution of the economic outlook and risks to the outlook would likely warrant leaving rates unchanged for the remainder of the year. The European Central Bank President Mario Draghi on Wednesday said the bank stands ready to deploy more policy tools, if any contingency warranted given the weaker growth outlook. The US Labor Department said its consumer price index climbed by 0.4% in March after edging up by 0.2% in February. Consumer prices showed their biggest monthly increase in over a year, as energy prices soared by 3.5% in March after rising by 0.4% in February. Excluding the jump in energy prices and a modest increase in food prices, core consumer prices inched up by 0.1% in February, matching the uptick seen in the previous month. UK economy expanded at a slower pace in February, figures from the Office For National Statistics showed on Wednesday. Gross domestic product or GDP grew 0.2% month-on-month in February, while the economy expanded 0.5% in January. Japan total value of core machine orders was up a seasonally adjusted 1.8% on month in February, the Cabinet Office said on Wednesday, coming in at 836.7 billion yen, following the 5.4% contraction in January. On a yearly basis, core machine orders sank 5.5% following the 2.9% decline in the previous month. Overall bank lending in Japan was up 2.4% on year in March, the Bank of Japan said - coming in at 535.367 trillion yen. This followed a 2.3% annual increase in February.

**Global Equities:** Mood remained cautious on global trade war fears. Traders also focused on the estimated dip in global growth rate.

**Indian Economy:** Rising protectionism, fluctuation in commodity prices and inadequate availability of liquidity are the three major challenges, which exporters will face in the coming months, exporters body Federation of Indian Export Organisations (FIEO) said. As per the current growth rate, India's merchandise exports will touch \$330 billion in 2018-19. During the April-February period of 2018-19, exports grew 8.85 per cent to \$298.47 billion, while imports rose by 9.75% to \$464 billion. The government has retained the interest rate for General Provident Fund (GPF) and other related schemes at 8% for the April-June quarter.

**Equity Markets:** Local stocks saw heavy selling yesterday amid mixed global cues as buyers were absent ahead of the start of the earnings season. Except auto and pharma, all other sectoral indices ended in red led by bank, metal, IT, infra, energy and FMCG.

**Corporate News:** Ratnamani Metals & Tubes announced that CRISIL has reaffirmed ratings for outstanding for the debt instruments / facilities of the Company. The Board of RSWM at its meeting held on 10 April 2019 has decided to sell 1,69,38,599 Equity Shares of Rs 10 each held in Bhilwara Energy, an Associate Company of RSWM at a cash consideration of Rs 84.85 crore to HEG on the basis of valuation of fair price per share on arm's length basis.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	176.8	227.0	227.0
MF(INR cr)	(524.1)	(257.7)	(257.7)

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,678	37,403	37,403
F&O(INR cr)	1,159,692	1,021,825	1,021,825

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.3	13.5	13.5
NSE VIX	21.1	19.2	19.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,804	(1.0) %	(1.7) %	Energy	16,027	(0.3) %	(3.1) %
IT	15,999	(0.8) %	1.0 %	Pharma	9,408	0.8 %	0.3 %
Metals	3,105	(0.9) %	0.1 %	Finance	12,427	(1.1) %	(0.6) %
Auto	8,645	0.3 %	2.7 %	PSU	3,278	(1.0) %	(3.2) %
FMCG	29,995	(0.1) %	(0.7) %	Real Estate	277	1.1 %	3.6 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	216	4.9 %	15.3 %	DLF	180	(4.3) %	(7.9) %
Tata Motor	102	3.1 %	10.7 %	Vodafone I	16	(3.5) %	(7.9) %
Cipla	546	2.7 %	4.0 %	Bharti Air	340	(3.3) %	(0.2) %
Wipro	281	2.6 %	7.4 %	Page Indus	23,819	(3.1) %	(6.7) %
Avenue Sup	1,522	2.4 %	2.0 %	Hindalco I	212	(2.5) %	(1.9) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (APR)	11-04-2019	00:00	AUD	-	-
RBA's Debelle Gives Speech	11-04-2019	02:30	AUD	-	-
New Housing Price Index (MoM) (FEB)	11-04-2019	12:30	CAD	-	-
New Housing Price Index (YoY) (FEB)	11-04-2019	12:30	CAD	-	-
Consumer Price Index (YoY) (MAR)	11-04-2019	01:30	CNY	-	-
Producer Price Index (YoY) (MAR)	11-04-2019	01:30	CNY	-	-
German Consumer Price Index (MoM) (MAR F)	11-04-2019	06:00	EUR	-	-
German Consumer Price Index (YoY) (MAR F)	11-04-2019	06:00	EUR	-	-
Tokyo Avg Office Vacancies (MAR)	11-04-2019	02:00	JPY	-	-
Industrial Production NSA (YoY) (FEB)	11-04-2019	13:00	MXN	-	-
BusinessNZ Manufacturing PMI (MAR)	11-04-2019	22:30	NZD	-	-
Card Spending Retail (MoM) (MAR)	11-04-2019	22:45	NZD	-	-
Net Migration s.a. (FEB)	11-04-2019	22:45	NZD	-	-
NZ Card Spending (MoM) (MAR)	11-04-2019	22:45	NZD	-	-
Continuing Claims (MAR 30)	11-04-2019	12:30	USD	-	1717k
Initial Jobless Claims (APR 06)	11-04-2019	12:30	USD	-	202k
PPI Ex Food, Energy, Trade (MoM) (MAR)	11-04-2019	12:30	USD	-	-
PPI Ex Food, Energy, Trade (YoY) (MAR)	11-04-2019	12:30	USD	-	-
PPI Final Demand (YoY) (MAR)	11-04-2019	12:30	USD	-	-
Producer Price Index Ex Food and Energy (MoM) (MAR)	11-04-2019	12:30	USD	-	-
Producer Price Index Ex Food and Energy (YoY) (MAR)	11-04-2019	12:30	USD	-	-
Producer Price Index Final Demand (MoM) (MAR)	11-04-2019	12:30	USD	-	-
Fed's Clarida Speaks at Annual IIF Meeting in Washington	11-04-2019	13:30	USD	-	-
Fed's Bullard Speaks on Economy and Monetary Policy	11-04-2019	13:40	USD	-	-
EIA Working Natural Gas Implied Flow (APR 05)	11-04-2019	14:30	USD	-	-
U.S. to Sell 4-Week Bills	11-04-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	11-04-2019	15:30	USD	-	-
Fed's Quarles Takes Part in FSB Roundtable	11-04-2019	15:50	USD	-	-
U.S. to Sell USD16 Bln 30 Year Bonds	11-04-2019	17:00	USD	-	-



Fed's Kashkari to Hold Q&A Via Twitter	11-04-2019	18:00	USD	-	-
Fed's Bowman Speaks on Community Banking	11-04-2019	20:00	USD	-	-

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