



11 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,717	0.0 %	4.9 %
BSE SENSEX	35,246	(0.2) %	6.0 %
CNX BANK	26,131	0.0 %	7.4 %
CNX MIDCAP	19,424	0.0 %	1.7 %
CNX SMALLCAP	8,126	0.0 %	2.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,740	0.8 %	(0.3) %
S&P 500	2,723	0.9 %	1.0 %
FTSE 100	7,701	0.5 %	0.7 %
HANG SENG	30,809	0.9 %	1.0 %
NIKKEI	22,497	0.4 %	(4.3) %
SHANGHAI COMPOSITE	3,174	0.5 %	(5.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.32	0.4 %	5.7 %
EUR/USD	1.19	0.6 %	(0.7) %
GBP/USD	1.35	(0.0) %	0.2 %
USD/JPY	109.35	(0.2) %	(3.0) %
USD/AUD	1.33	(1.4) %	3.8 %
USD/SGD	1.34	(0.5) %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	3.0 %	17.8 %
Gold(INR/10g)	31,261	0.4 %	6.5 %
Gold Comex(USD/oz)	1,314	0.2 %	0.4 %
SILVER(INR/1Kg)	39,713	0.9 %	2.9 %
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: UK construction output dropped 2.3% month-over-month in March, following a 1.0 percent fall in February, data from the Office for National Statistics showed Thursday. The decrease stemmed from a fall in all new work, which also continued to decline following a contraction in February, decreasing by 2.9%. On a yearly basis, construction output slipped 4.9% in March, faster than the 1.8% decrease in February. Japan's current index of Economy Watchers' survey rose to 49.0 in April from 48.9 in March. A measure of peoples' assessment of the Japanese economy increased marginally in April, in line with expectations, survey figures from the Cabinet Office showed. Any reading above 50 indicates optimism and a score below 50 suggests pessimism. The outlook index improved to 50.1 in April from 49.6 in the preceding month.

Global Equities: Sentiments remained steady for world equities as rising commodity prices and recent earnings dominated the overall environment.

Indian Economy: Domestic passenger vehicle sales rose 7.5% to 2,98,504 units in April from 2,77,683 units in the same month last year. Domestic car sales edged up 4.89% at 2,00,183 units against 1,90,854 units in April 2017, according to data released by the Society of Indian Automobile Manufacturers (SIAM). Motorcycle sales last month rose 19.38 per cent to 12,29,526 units from 10,29,963 units a year earlier. Total two-wheeler sales rose 16.92 per cent to 19,58,241 units (16,74,787 units). SIAM said sales of commercial vehicles were up 75.95 per cent at 72,993 units in April. Vehicle sales across categories registered a rise of 17.44 per cent to 23,79,718 units from 20,26,373 units in April 2017.

Equity Markets: Key benchmark indices ended with modest losses in a volatile session of trade as investors turned cautious ahead of the Karnataka assembly elections on 12 May 2018. Higher crude oil prices also weighed on sentiment. Pharmaceutical shares declined. Realty stocks dropped. Broader market witnessed selling pressure. The BSE Mid-Cap index fell 1.52%. The BSE Small-Cap index fell 1.36%.

Corporate News: Nestle India's net profit soared 38% to Rs 424 crore in Q4 FY18. The company reported 10.5% year-on-year increase in net sales at Rs 2,736.8 crore helped by volume growth. Earnings before interest, tax, depreciation, and amortisation (EBITDA) grew 35% to Rs 676.4 crore. The company had reported EBITDA of Rs 501.2 crore in the same quarter a year ago. India Inc's mergers and acquisitions (M&As) tally rose eight-fold to \$19.1 billion with 40 transactions in April, making it the highest monthly deal value recorded after March 2017, according to a report from Grant Thornton. It noted that relative easing of regulatory ecosystem and consolidation across sectors have significantly driven the deal activity in April this year, sealing deals (M&A and PE) worth USD 21 billion across 119 deals. The monetary threshold for public sector banks to report frauds to different departments of the CBI for a probe has been revised, according to the Central Vigilance Commission (CVC). Frauds of minimum Rs 3 crore and to Rs 25 crore, up from Rs 15 crore, have to be reported to either the CBI's Anti-Corruption Branch (in case staff involvement is prima facie evident) or to the Economic Offences Wing (if employees involvement is prima facie not evident) respectively, the CVC stated, according to media reports. Adani Group firm Adani Transmission Ltd (ATL) posted 58% spurt in consolidated net profit at Rs 150.27 crore for the March quarter of 2017-18. The total income in the quarter rose to Rs 878.04 crore from Rs 840.47 crore in the year-ago three months.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(102.4)	(73.3)	(52.7)
MF(INR cr)	(13.9)	281.8	458.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,746	34,424	34,073
F&O(INR cr)	1,146,074	706,576	734,509

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	15.0	17.5
NSE VIX	14.4	13.7	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,131	(0.1) %	7.4 %	Energy	13,960	0.3 %	5.0 %
IT	13,427	(0.2) %	5.7 %	Pharma	8,545	(1.8) %	(0.9) %
Metals	3,656	(1.0) %	3.3 %	Finance	10,859	(0.1) %	5.8 %
Auto	11,346	(0.6) %	2.6 %	PSU	2,821	(1.2) %	(1.2) %
FMCG	28,231	(0.7) %	6.5 %	Real Estate	311	(2.0) %	4.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ONGC	188	3.0 %	4.6 %	SAIL	73	(4.0) %	(0.6) %
Bharti Air	412	2.4 %	4.3 %	Bank of Ba	139	(3.9) %	(2.3) %
Emami	1,039	2.3 %	(4.9) %	Idea Cellu	58	(3.8) %	(25.0) %
SBI Life I	714	2.0 %	4.4 %	Dr Reddy's	1,990	(3.6) %	(6.7) %
Tech Mahin	664	1.5 %	3.6 %	BHEL	81	(3.6) %	(2.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (MoM) (MAR)	11-05-2018	1:30	AUD	-	(0.002)
Investment Lending (MAR)	11-05-2018	1:30	AUD	-	0.005
Value of Loans (MoM) (MAR)	11-05-2018	1:30	AUD	-	0.013
Full Time Employment Change (APR)	11-05-2018	12:30	CAD	-	68.3
Hourly Earnings Permanent Employees (YoY) (APR)	11-05-2018	12:30	CAD	-	0.031
Net Change in Employment (APR)	11-05-2018	12:30	CAD	-	-
Part Time Employment Change (APR)	11-05-2018	12:30	CAD	-	(35.9)
Participation Rate (APR)	11-05-2018	12:30	CAD	-	65.5
Unemployment Rate (APR)	11-05-2018	12:30	CAD	-	0.058
Bank of Canada's Wilkins Speaks at Women's Forum Canada	11-05-2018	13:00	CAD	-	-
BOJ Outright Bond Purchase 10~25 Years	11-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	11-05-2018	1:10	JPY	-	-
Export Price Index (MoM) (APR)	11-05-2018	12:30	USD	-	0.003
Export Price Index (YoY) (APR)	11-05-2018	12:30	USD	-	0.034
Import Price Index (MoM) (APR)	11-05-2018	12:30	USD	-	0
Import Price Index (YoY) (APR)	11-05-2018	12:30	USD	-	0.036
Import Price Index ex Petroleum (MoM) (APR)	11-05-2018	12:30	USD	-	0.001
U. of Mich. 1 Yr Inflation (MAY P)	11-05-2018	14:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (MAY P)	11-05-2018	14:00	USD	-	0.025
U. of Mich. Current Conditions (MAY P)	11-05-2018	14:00	USD	-	114.9
U. of Mich. Expectations (MAY P)	11-05-2018	14:00	USD	-	88.4
U. of Mich. Sentiment (MAY P)	11-05-2018	14:00	USD	-	98.8
Baker Hughes U.S. Rig Count (MAY 11)	11-05-2018	17:00	USD	-	1032

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