



12 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,415	(0.0) %	2.0 %
BSE SENSEX	33,940	0.2 %	2.2 %
CNX BANK	25,013	(0.3) %	2.8 %
CNX MIDCAP	19,637	0.0 %	2.8 %
CNX SMALLCAP	8,203	(0.0) %	3.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,189	(0.9) %	(2.6) %
S&P 500	2,642	(0.6) %	(2.0) %
FTSE 100	7,257	(0.1) %	(5.1) %
HANG SENG	30,898	0.6 %	1.3 %
NIKKEI	21,687	(0.5) %	(7.7) %
SHANGHAI COMPOSITE	3,208	0.6 %	(4.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.31	0.4 %	2.6 %
EUR/USD	1.24	0.5 %	3.0 %
GBP/USD	1.42	0.4 %	5.0 %
USD/JPY	106.91	(0.2) %	(5.2) %
USD/AUD	1.29	(0.2) %	0.9 %
USD/SGD	1.31	(0.1) %	(2.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	2.0 %	10.7 %
Gold(INR/10g)	31,023	1.3 %	5.7 %
Gold Comex(USD/oz)	1,354	0.8 %	3.5 %
SILVER(INR/1Kg)	38,653	1.2 %	0.1 %
Aluminium(USD/MT)	2,253	3.8 %	(0.1) %
Copper(USD/MT)	6,931	0.6 %	(3.5) %

FIXED INCOME

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

Global Economy: All of the Federal Reserve's policymakers felt that the U.S. economy would firm further and that inflation would rise in the coming months, minutes of the central bank's last policy meeting on March 20-21 released on Wednesday showed. China's factory inflation slowed for a fifth month while the consumer price index retreated from a four-year high. The producer price index rose 3.1% in March from a year earlier, compared with 3.7% in February. The consumer price index climbed 2.1% versus 2.9% in February. UK's economic growth eased in the first quarter as severe weather disrupted activity across major sectors in March, the National Institute of Economic and Social Research reported. According to monthly estimates of GDP, output growth eased to 0.2% in the first quarter from 0.4% in the fourth quarter of 2017, think tank said. Japan core machine orders advanced a seasonally adjusted 2.1% on month in February, the Cabinet Office said, coming in at 891.0 billion yen following the 8.2% surge in January. On a yearly basis, core machine orders advanced 2.4% following the 2.9% gain in the previous month.

Global Equities: DOW slipped nearly 1% on continued selling pressure. Markets also tracked escalating tensions in Syria following recent gas attack.

Indian Economy: After two years of declining growth, Indian economy is set to expand 7.3% in 2018-19 and 7.6% in 2019-20, aided by various growth oriented new policy measures, says a new Asian Development Bank (ADB) report. In its latest Asian Development Outlook (ADO) 2018 report, the Manila-based Bank said that dip in GDP growth to 6.6% in 2017-18 was driven in part by lingering effects of demonetisation, which impacted the informal sector in the first half of 2017-18. Teething issues related to implementation of Goods and Services Tax (GST), which hampered operations of small and medium sized enterprises and exporters, also contributed to growth moderation.

Equity Markets: Key benchmark indices settled with small gains following a divergent trend in index pivots. Extending gains for the fifth trading session, the Sensex settled at almost six-week high while the Nifty hit over four-week closing high. The market breadth, indicating the overall health of the market, was negative. Shares of public sector oil marketing companies (PSU OMCs) slumped following rise in crude oil prices. Most private sector bank stocks rose. Public sector bank stocks fell.

Corporate News: India's fuel product consumption or sales galloped 7.2% to 18.62 mt in March 2018 over a year ago. Diesel sales jumped 8.0% to 7.35 mt, petrol 14.2% to 2.40 mt, LPG 8.9% to 2.06 mt, petcoke 6.5% to 2.33 mt and ATF 11.1% to 0.69 mt. Consumption or sales of fuel products increased 5.3% to 204.92 mt in April-March FY2018 over April-March FY2017. Sales of diesel increased 6.6%, petrol 10.1%, petcoke 9.3%, LPG 8.0% and ATF 8.9%. Balrampur Chini Mills announced that CRISIL has rated the company's Rs 1200 crore commercial programme at CRISIL A1+. Online recruitment activity registered 12% spurt in March with demand for finance and healthcare professionals witnessing a significant uptrend, says a report. The Monster Employment Index India stood at 292 in March as compared to 261 in the year-ago month.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(110.5)	(44.0)	(44.0)
MF(INR cr)	983.8	315.0	315.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,014	32,663	32,663
F&O(INR cr)	734,207	648,836	648,836

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.2	21.3	21.3
NSE VIX	14.7	15.1	15.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,098	(0.5) %	3.2 %	Energy	13,582	(0.4) %	2.2 %
IT	12,759	1.5 %	0.4 %	Pharma	8,762	0.5 %	1.6 %
Metals	3,742	1.6 %	5.7 %	Finance	10,503	(0.4) %	2.4 %
Auto	11,454	0.6 %	3.6 %	PSU	2,993	(2.3) %	4.9 %
FMCG	27,159	0.2 %	2.5 %	Real Estate	305	(0.4) %	3.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vedanta	297	4.5 %	5.1 %	H P C L	337	(7.7) %	(2.3) %
SBI Life I	719	3.3 %	5.1 %	B P C L	417	(7.5) %	(1.4) %
United Spi	3,460	3.3 %	5.9 %	I O C L	167	(6.7) %	(1.8) %
TCS	3,014	2.6 %	3.6 %	Punjab Nat	102	(2.9) %	6.1 %
Sun Pharma	521	2.6 %	2.7 %	Adani Port	378	(2.4) %	2.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (Apr)	12-04-2018	1:00	AUD	-	-
Credit Card Balances (Feb)	12-04-2018	1:30	AUD	-	A\$51.6b
Credit Card Purchases (Feb)	12-04-2018	1:30	AUD	-	A\$26.5b
Home Loans (MoM) (Feb)	12-04-2018	1:30	AUD	-	-
Investment Lending (Feb)	12-04-2018	1:30	AUD	-	-
Value of Loans (MoM) (Feb)	12-04-2018	1:30	AUD	-	-
New Housing Price Index (MoM) (Feb)	12-04-2018	12:30	CAD	-	-
New Housing Price Index (YoY) (Feb)	12-04-2018	12:30	CAD	-	-
Teranet/National Bank HP Index (Mar)	12-04-2018	12:30	CAD	-	-
Teranet/National Bank HPI (MoM) (Mar)	12-04-2018	12:30	CAD	-	-
Teranet/National Bank HPI (YoY) (Mar)	12-04-2018	12:30	CAD	-	-
PBOC Governor Yi Gang speaks at IMF/PBOC conference in Beijing	12-04-2018	0:45	CNY	-	-
ECB Publishes Account of March Policy Meeting	12-04-2018	11:30	EUR	-	-
ECB's Coeure Speaks in Paris	12-04-2018	12:15	EUR	-	-
Euro-Zone Industrial Production s.a. (MoM) (Feb)	12-04-2018	9:00	EUR	-	-
Euro-Zone Industrial Production w.d.a. (YoY) (Feb)	12-04-2018	9:00	EUR	-	-
Bank of England Credit Conditions & Bank Liabilities Surveys	12-04-2018	8:30	GBP	-	-
BOE's Broadbent speaks in Sydney.	12-04-2018	6:30	GBP	-	-
Kuroda Speaks at Branch Managers Meeting	12-04-2018	0:30	JPY	-	-
Tokyo Avg Office Vacancies (Mar)	12-04-2018	2:00	JPY	-	-
Banxico Interest Rate Decision (Apr 12)	12-04-2018	10:00	MXN	-	-
BusinessNZ Manufacturing PMI (Mar)	12-04-2018	22:30	NZD	-	-
Continuing Claims (Mar 31)	12-04-2018	12:30	USD	-	1808k
EIA Natural Gas Storage Change (Apr 6)	12-04-2018	14:30	USD	-	-
EIA Working Natural Gas Implied Flow (Apr 6)	12-04-2018	14:30	USD	-	-
Export Price Index (MoM) (Mar)	12-04-2018	12:30	USD	-	-
Export Price Index (YoY) (Mar)	12-04-2018	12:30	USD	-	-
Fed's Kashkari Speaks in Moderated Q&A in Minneapolis	12-04-2018	21:00	USD	-	-
Import Price Index (MoM) (Mar)	12-04-2018	12:30	USD	-	-



Import Price Index (YoY) (Mar)	12-04-2018	12:30	USD	-	-
Import Price Index ex Petroleum (MoM) (Mar)	12-04-2018	12:30	USD	-	-
Initial Jobless Claims (Apr 7)	12-04-2018	12:30	USD	-	242k
U.S. to Sell USD13 Bln 30-Year Bonds Reopening	12-04-2018	17:00	USD	-	-

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