



12 Apr.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,597	0.0 %	(0.6) %
BSE SENSEX	38,607	0.1 %	(0.7) %
CNX BANK	29,786	0.0 %	(1.8) %
CNX MIDCAP	18,092	0.0 %	(1.3) %
CNX SMALLCAP	6,694	0.0 %	(0.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,143	(0.1) %	12.1 %
S&P 500	2,888	0.0 %	15.2 %
FTSE 100	7,418	(0.1) %	10.2 %
HANG SENG	29,839	(0.9) %	18.7 %
NIKKEI	21,711	0.1 %	11.0 %
SHANGHAI COMPOSITE	3,190	(1.6) %	29.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.11	(0.5) %	(0.5) %
EUR/USD	1.13	0.0 %	(1.6) %
GBP/USD	1.31	0.1 %	2.6 %
USD/JPY	111.32	0.1 %	1.6 %
USD/AUD	1.40	(0.2) %	(1.5) %
USD/SGD	1.35	0.1 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	(1.6) %	36.6 %
Gold(INR/10g)	31,770	(0.4) %	0.8 %
Gold Comex(USD/oz)	1,290	(1.3) %	(0.1) %
SILVER(INR/1Kg)	37,274	(1.1) %	(2.6) %
Aluminium(USD/MT)	1,848	(0.2) %	(0.6) %
Copper(USD/MT)	6,433	(0.2) %	10.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	0.0 %	(0.1) %

Global Economy: The US Labor Department said its producer price index for final demand climbed by 0.6% in March after rising by 0.1% in February. China's consumer prices soared on the back of temporary food supply factors. Consumer inflation accelerated to 2.3% in March from a year earlier, up from 1.5% in February and posting the biggest jump in more than a year, according to the National Bureau of Statistics. Food prices climbed 4.1% year on year last month, up from 0.7% in February, according to the NBS. Core consumer prices, excluding food and energy, stayed flat at 1.8%. China's producer price index (PPI), which measures costs for goods at the factory gate, gained 0.4% year-on-year in March, picking up pace from the 0.1% growth recorded in February. Eurozone house price inflation slowed in the fourth quarter of 2018 after remaining unchanged in the previous three months, preliminary data from Eurostat showed. Eurozone house prices gained 4.2% year-on-year following a 4.3% increase in each of the previous two quarters. Germany's inflation rate eased in March on the back of a slowdown in food-price inflation. Germany's annual inflation rate measured by European Union-harmonized standards slips to 1.4% from 1.7% in February.

Global Equities: Sentiments stayed lax. Worries about a global growth slowdown stayed in place, offsetting a temporary Brexit relief. Commodities eased on demand concerns.

Indian Economy: India's priority continues to be gradual fiscal consolidation because the gross general government to Gross Domestic Product (GDP) ratio is at about 70 per cent, according to Paolo Mauro, Deputy Director, the IMF's Fiscal Affairs Department, media reports noted. There is a lot of scope in India for reducing 'untargeted' food and fertilizer subsidies and enhancing revenue administration, he stated further. Indian sugar mills contracted to export 2.7 million tonnes of sugar since the current season began in October last year, All India Sugar Trade Association stated. India's total Money Supply (M3) stood at Rs 154424.7 billion as on 29th March 2019, recording a surge of 10.6% over the year. Currency with the public stood at Rs 20551.1 billion, up 16.7% over the year. Demand deposits with banks were up 9.6% at Rs 16263.5 billion. Time deposits with banks were also up 9.6% at Rs 117205.9 billion.

Equity Markets: Local stocks saw a very choppy movement yesterday. Weak global cues and cautious mood among investors kept the sentiments tight. Sensex added 21.66 points or 0.06% to settle at 38,607.01. Nifty 50 index gained 12.40 points or 0.11% to settle at 11,596.70. Markets are set to be volatile as the General Elections have started and recent surge in crude oil is expected to cap upside for local stocks.

Corporate News: Infosys and Tata Consultancy Services (TCS) will declare their Q4 March 2019 results today, 12 April 2019. Dewan Housing Finance Corporation (DHFL) will be watched. Brickwork Ratings India has downgraded the credit ratings on DHFL's facilities/instruments, including secured non-convertible debentures and fixed deposits, aggregating Rs 56,550 crore. The downgrade is on account of limited progress in building up liquidity, selling/ exiting riskier construction finance loans. Lumax Auto Technologies announced its joint venture with JOPP, Germany to manufacture and supply transmission products to the Indian automotive industry. Air-conditioning and refrigeration major Blue Star said that with the commissioning of its proposed plant in Andhra its capacity will double to 10 lakh units per annum by 2022.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	185.5	221.9	221.9
MF(INR cr)	146.2	(260.3)	(260.3)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,098	36,703	36,703
F&O(INR cr)	1,994,995	1,129,955	1,129,955

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.0	13.4	13.4
NSE VIX	21.0	19.4	19.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,786	(0.1) %	(1.8) %	Energy	16,159	0.8 %	(2.3) %
IT	15,875	(0.8) %	0.2 %	Pharma	9,391	(0.2) %	0.2 %
Metals	3,067	(1.2) %	(1.1) %	Finance	12,450	0.2 %	(0.4) %
Auto	8,690	0.5 %	3.3 %	PSU	3,276	(0.1) %	(3.2) %
FMCG	30,151	0.5 %	(0.1) %	Real Estate	275	(0.7) %	2.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HDFC Life	394	4.5 %	2.7 %	Vedanta	181	(3.9) %	(4.1) %
Ashok Leyl	95	3.2 %	4.6 %	Avenue Sup	1,473	(3.3) %	(1.4) %
B H E L	74	3.0 %	(2.1) %	General In	243	(2.3) %	(1.2) %
Indiabulls	846	2.6 %	(0.2) %	S A I L	57	(2.1) %	3.1 %
ACC	1,676	2.4 %	1.8 %	Bandhan Ba	540	(1.8) %	1.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Financial Stability Review	12-04-2019	01:30	AUD	-	-
Teranet/National Bank HP Index (MAR)	12-04-2019	12:30	CAD	-	-
Teranet/National Bank HPI (MoM) (MAR)	12-04-2019	12:30	CAD	-	-
Teranet/National Bank HPI (YoY) (MAR)	12-04-2019	12:30	CAD	-	-
German Wholesale Price Index (MoM) (MAR)	12-04-2019	06:00	EUR	-	-
German Wholesale Price Index (YoY) (MAR)	12-04-2019	06:00	EUR	-	-
Euro-Zone Industrial Production s.a. (MoM) (FEB)	12-04-2019	09:00	EUR	-	-
Euro-Zone Industrial Production w.d.a. (YoY) (FEB)	12-04-2019	09:00	EUR	-	-
ECB's Praet Speaks in Washington	12-04-2019	12:45	EUR	-	-
BOJ Outright Bond Purchase 1~3 Years	12-04-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	12-04-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	12-04-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	12-04-2019	01:10	JPY	-	-
Export Price Index (MoM) (MAR)	12-04-2019	12:30	USD	-	-
Export Price Index (YoY) (MAR)	12-04-2019	12:30	USD	-	-
Import Price Index (MoM) (MAR)	12-04-2019	12:30	USD	-	-
Import Price Index (YoY) (MAR)	12-04-2019	12:30	USD	-	-
Import Price Index ex Petroleum (MoM) (MAR)	12-04-2019	12:30	USD	-	-
U. of Mich. 1 Yr Inflation (APR P)	12-04-2019	14:00	USD	-	-
U. of Mich. 5-10 Yr Inflation (APR P)	12-04-2019	14:00	USD	-	-
U. of Mich. Current Conditions (APR P)	12-04-2019	14:00	USD	-	-
U. of Mich. Expectations (APR P)	12-04-2019	14:00	USD	-	-
U. of Mich. Sentiment (APR P)	12-04-2019	14:00	USD	-	-
Baker Hughes U.S. Rig Count (APR 12)	12-04-2019	17:00	USD	-	-

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