



13 Apr.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,485	0.2 %	2.7 %
BSE SENSEX	34,101	0.5 %	2.8 %
CNX BANK	25,291	0.4 %	4.0 %
CNX MIDCAP	19,669	0.5 %	3.0 %
CNX SMALLCAP	8,226	0.7 %	3.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,483	1.2 %	(1.4) %
S&P 500	2,664	0.8 %	(1.2) %
FTSE 100	7,258	0.0 %	(5.1) %
HANG SENG	30,831	(0.2) %	1.0 %
NIKKEI	21,660	(0.1) %	(7.9) %
SHANGHAI COMPOSITE	3,180	(0.9) %	(5.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.25	0.4 %	2.5 %
EUR/USD	1.23	(0.3) %	2.6 %
GBP/USD	1.42	0.4 %	5.3 %
USD/JPY	107.36	0.3 %	(4.8) %
USD/AUD	1.29	(0.2) %	0.7 %
USD/SGD	1.31	0.2 %	(1.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	0.4 %	11.1 %
Gold(INR/10g)	31,013	(0.0) %	5.6 %
Gold Comex(USD/oz)	1,343	(0.9) %	2.6 %
SILVER(INR/1Kg)	38,453	(0.5) %	(0.4) %
Aluminium(USD/MT)	2,221	(1.4) %	(1.6) %
Copper(USD/MT)	6,756	(2.5) %	(5.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.4 %

**Global Economy:** First time claims for US unemployment benefits decreased in the week ended April 7th, according to a report released by the Labor Department on Thursday. The report said initial jobless claims fell to 233,000, a drop of 9,000 from the previous week's unrevised level of 242,000. Eurozone industrial production decreased for the third straight month in February, Eurostat reported. Industrial output fell 0.8 percent month-on-month in February, following a 0.6% drop in January. This was the third consecutive fall for the measure. UK economic growth remained subdued in the first quarter despite a strong export performance, according to the latest Quarterly Economic Survey from the British Chambers of Commerce.

**Global Equities:** Easing geopolitical concerns helped US stocks to turn in a strong performance. The major averages climbed firmly in positive territory, offsetting the weakness seen in the previous session.

**Indian Economy:** India's industrial production (base year 2011-12=100) continued to record a healthy growth for the fourth straight month at 7.1% in February 2018 over February 2017. The manufacturing sector's production surged 8.7% in February 2018, contributing to the overall growth in industrial production. The all-India general CPI inflation eased marginally to five-month low of 4.28% in March 2018 (new base 2012=100), compared with 4.44% in February 2018. The corresponding provisional inflation rate for rural area was 4.44% and urban area 4.12% in March 2018 as against 4.45% and 4.52% in February 2018. The core CPI inflation increased to 5.23% in March 2018, after remaining flat for previous three straight months at 5.03% in February 2018. The cumulative CPI inflation has declined to 3.59% in April-March FY2018 compared with 4.52% in April-March FY2017.

**Equity Markets:** Domestic stocks logged modest gains in a steady session of trade. Extending gains for the sixth straight trading session, the Sensex and the Nifty, both, settled at their highest closing level in over six weeks. Key indices opened on a flat note. Stocks firmed up as the day's trade progressed. Metal shares declined. IT shares were in demand as the rupee weakened against the dollar. Private sector banks were mixed. Most public sector banks declined though.

**Corporate News:** IT major Infosys announces its Q4 results today, 13 April 2018. Reliance Industries (RIL) has entered into agreements on 12 April 2018 to acquire 34,33,767 equity shares of Indiavidual Learning (Embibe), for cash consideration, translating to 72.69% shareholding of Embibe on a fully diluted basis. RIL has agreed to invest upto rupee equivalent of \$180 million into Embibe, (including consideration to be paid for acquiring majority stake from existing investors) over the next three years. HCL Technologies (HCL) and Sumeru Equity Partners (SEP), a technology and growth-focused private equity firm, have signed a definitive agreement to acquire Actian Corporation. The all-cash deal is valued at \$330 million. HCL will own 80% while SEP will own approximately 20% stake of the JV entity which inturn will own 100% shareholding of Actian Corporation.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	68.2	(30.0)	(30.0)
MF(INR cr)	15.1	396.2	396.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,937	32,693	32,693
F&O(INR cr)	1,358,258	727,661	727,661

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.5	20.9	20.9
NSE VIX	14.6	15.0	15.0

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,195	0.4 %	3.6 %	Energy	13,575	(0.1) %	2.1 %
IT	13,168	3.2 %	3.6 %	Pharma	8,685	(0.9) %	0.7 %
Metals	3,690	(1.4) %	4.3 %	Finance	10,556	0.5 %	2.9 %
Auto	11,460	0.1 %	3.6 %	PSU	2,955	(1.3) %	3.5 %
FMCG	27,041	(0.4) %	2.0 %	Real Estate	300	(1.9) %	1.1 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HCL Techno	1,010	4.4 %	3.1 %	S A I L	74	(4.0) %	1.3 %
TCS	3,139	4.2 %	7.9 %	Vedanta	289	(2.7) %	2.3 %
Infosys	1,163	3.4 %	2.2 %	DLF	209	(2.2) %	3.9 %
Havells In	548	3.3 %	8.0 %	Lupin	773	(2.1) %	(0.5) %
Tech Mahin	653	3.1 %	2.0 %	Cummins In	747	(1.9) %	4.3 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Financial Stability Review	13-04-2018	1:30	AUD	-	-
Existing Home Sales (MoM) (Mar)	13-04-2018	13:00	CAD	-	-
Euro-Zone Trade Balance (euros) (Feb)	13-04-2018	9:00	EUR	-	3.3b
Euro-Zone Trade Balance s.a. (Feb)	13-04-2018	9:00	EUR	-	19.9b
German Consumer Price Index (MoM) (Mar F)	13-04-2018	6:00	EUR	-	-
German Consumer Price Index (YoY) (Mar F)	13-04-2018	6:00	EUR	-	-
BOJ Outright Bond Purchase 1~3 Years	13-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	13-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	13-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	13-04-2018	1:10	JPY	-	-
Baker Hughes U.S. Rig Count (Apr 13)	13-04-2018	17:00	USD	-	-
Fed's Bullard Speaks on Living Standards across U.S. Cities	13-04-2018	13:00	USD	-	-
Fed's Kaplan Speaks in Odessa	13-04-2018	17:00	USD	-	-
Fed's Rosengren Speaks on Economic Outlook	13-04-2018	12:00	USD	-	-
JOLTS Job Openings (Feb)	13-04-2018	14:00	USD	-	-
U. of Mich. 1 Yr Inflation (Apr P)	13-04-2018	14:00	USD	-	-
U. of Mich. 5-10 Yr Inflation (Apr P)	13-04-2018	14:00	USD	-	-
U. of Mich. Current Conditions (Apr P)	13-04-2018	14:00	USD	-	-
U. of Mich. Expectations (Apr P)	13-04-2018	14:00	USD	-	-
U. of Mich. Sentiment (Apr P)	13-04-2018	14:00	USD	-	-

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