



13 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,279	(0.2) %	(3.3) %
BSE SENSEX	37,463	(0.3) %	(3.6) %
CNX BANK	29,041	0.5 %	(4.2) %
CNX MIDCAP	17,029	0.5 %	(7.1) %
CNX SMALLCAP	6,268	0.6 %	(7.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,942	0.4 %	11.2 %
S&P 500	2,881	0.4 %	14.9 %
FTSE 100	7,203	(0.1) %	7.0 %
HANG SENG	28,550	0.8 %	13.6 %
NIKKEI	21,345	(0.3) %	9.1 %
SHANGHAI COMPOSITE	2,939	3.1 %	19.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.94	(0.0) %	0.7 %
EUR/USD	1.12	0.2 %	(1.9) %
GBP/USD	1.30	0.0 %	2.1 %
USD/JPY	109.82	0.0 %	0.2 %
USD/AUD	1.43	(0.3) %	0.6 %
USD/SGD	1.36	(0.1) %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	(12.4) %	32.5 %
Gold(INR/10g)	31,751	0.1 %	0.7 %
Gold Comex(USD/oz)	1,287	0.2 %	(0.3) %
SILVER(INR/1Kg)	36,983	(0.3) %	(3.3) %
Aluminium(USD/MT)	1,765	(0.1) %	(5.0) %
Copper(USD/MT)	6,135	0.4 %	5.1 %

FIXED INCOME

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

Global Economy: The FAO Food Price Index (FFPI) rose in April 2019 to 10-month high, while rising 1.5% from March 2019 level, The FFPI still remains 2.3% below its level in the corresponding month last year. Except for the sub-index for cereals, all the other sub-indices firmed in April, led by dairy and meat, and to a lesser extent vegetable oils and sugar. The US Labor Department said its consumer price index rose by 0.3% in April after climbing by 0.4% in March. Energy prices showed another substantial increase during the month, surging up by 2.9% in April after jumping by 3.5% in March. Excluding food and energy prices, core consumer prices inched up by 0.1% for third consecutive month. Compared to the same month a year ago, consumer prices in April were up by 2%, reflecting a modest acceleration from the 1.9% growth in March. The annual rate of growth in core consumer prices also edged up to 2.1% in April from 2% in the previous month. Germany's exports rose 1.5% month-on-month in March, after a revised 1.2% fall in February. This was the fastest growth since last December. Imports also grew 0.4% monthly, after a 1.6% decline in February. The seasonally adjusted trade surplus was EUR 20.0 billion in March. UK gross domestic product grew 0.5% from the final three months of 2018, when it rose 0.2%, preliminary estimates from the Office for National Statistics showed, led by a pick-up in manufacturing and business investment that took place ahead of the original Brexit deadline towards the end of March. On a month-on-month basis, GDP decreased 0.1% in March after a 0.2% gain in February.

Global Equities: Investors remained hopeful about the major global economies hammering out a workable proposition to their trade dispute. However, S&P 500 witnessed its worst weekly outing this year in the wake of the Trump administration's move to raise import duties on \$200 billion in Chinese goods.

Indian Economy: India's industrial production (base year 2011-12=100) declined 0.1% in March 2019, while snapping growth for last 21 straight months. The industrial production growth for February 2019 has been retained unchanged at 0.1% as reported provisionally. Twelve out of the 23 industry groups in the manufacturing sector were in the red in March. Both consumer durables (-5.1%) and non-durables (0.3%) showed poor performance.

Equity Markets: Key equity benchmarks logged modest losses in highly volatile session of trade on Friday as recent losses weighed on the sentiments. The Sensex settled below 37,500 level. Domestic stocks registered losses for eight straight trading session.

Corporate News: State-owned gas utility GAIL said it has completed awards for all major contracts for the ambitious Pradhan Mantri Urja Ganga natural gas pipeline project that transverse from Jagdishpur to Haldia and Bokaro (Jharkhand) and Dhamra in Odisha. Consumer durables stocks could be under selling pressure given the lax performance in industrial production data. IDFC First Bank reported a loss of Rs 218.03 crore for the quarter ended March 2019 against a profit of Rs 41.93 crore in the corresponding period of the last fiscal on account of higher provisioning. On an annual basis; it reported a loss of Rs 1,944.17 crore as against a profit of Rs 859.3 crore during 2017-18. The bank's gross NPAs stood at 2.43% of the gross advances during the January-March quarter of 2018-19, down from 3.31%.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(78.6)	54.4	129.9
MF(INR cr)	456.8	290.9	(131.0)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,710	24,028	32,050
F&O(INR cr)	673,090	1,238,852	1,201,048

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.0	16.7	13.9
NSE VIX	26.3	25.4	22.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,041	0.5 %	(4.2) %	Energy	15,494	(0.9) %	(6.3) %
IT	15,950	(1.1) %	0.7 %	Pharma	8,945	(0.4) %	(4.6) %
Metals	2,873	(1.5) %	(7.4) %	Finance	12,248	0.6 %	(2.0) %
Auto	8,093	(0.1) %	(3.8) %	PSU	3,023	2.5 %	(10.7) %
FMCG	29,359	(0.4) %	(2.8) %	Real Estate	251	0.0 %	(6.0) %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Zee Entert	371	3.7 %	(14.0) %	Tata Steel	487	(6.2) %	(9.0) %
St Bk of I	308	2.9 %	(4.6) %	HCL Techno	1,087	(4.4) %	(2.2) %
Bharti Air	324	2.7 %	3.6 %	Yes Bank	164	(3.8) %	(40.6) %
Titan Comp	1,132	2.5 %	1.0 %	Lupin	836	(3.4) %	9.1 %
Indiabulls	698	2.4 %	(17.6) %	IndusInd B	1,440	(2.5) %	(17.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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