



14 May.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,153	0.0 %	(4.4) %
BSE SENSEX	37,091	(1.0) %	(4.4) %
CNX BANK	28,660	0.0 %	(5.5) %
CNX MIDCAP	16,657	0.0 %	(9.1) %
CNX SMALLCAP	6,099	0.0 %	(9.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,325	(2.4) %	8.6 %
S&P 500	2,812	(2.4) %	12.2 %
FTSE 100	7,164	(0.6) %	6.4 %
HANG SENG	28,550	0.8 %	13.6 %
NIKKEI	21,191	(0.7) %	8.3 %
SHANGHAI COMPOSITE	2,904	(1.2) %	17.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.86	(0.2) %	0.6 %
EUR/USD	1.12	0.2 %	(1.9) %
GBP/USD	1.30	(0.1) %	2.0 %
USD/JPY	109.98	0.2 %	0.3 %
USD/AUD	1.43	(0.2) %	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)	31,961	0.7 %	1.4 %
Gold Comex(USD/oz)	1,287	0.2 %	(0.3) %
SILVER(INR/1Kg)	36,970	(0.0) %	(3.4) %
Aluminium(USD/MT)	1,765	(0.1) %	(5.0) %
Copper(USD/MT)	6,136	0.4 %	5.1 %

**FIXED INCOME**

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

**Indian Equities:** Local stocks tumbled, extending recent rout to test a two and half month low as global trade war fears and poor industrial output data hurt the mood. The Nifty slid 1.16% to close at 11148.2 while the SENSEX fell 0.99% to close at 37090.82. Nifty PSU Bank index closed down 5.00% at 2871.45. In other indices, Nifty Pharma index tumbled 4.37% and Nifty Media index plummeted 3.78% on the day.

**Corporate News:**

- Housing Development Finance Corporation (HDFC) reported fourth quarter (Q4FY19) standalone net profit at Rs 2,861.6 crore on the revenue of Rs 11,580 crore. The board recommended final dividend of Rs 17.50 per share. Gross NPA was at 1.18% against Rs 1.22%, while individual gross NPA was at 0.70% and non-individual gross NPA at 2.34%, QoQ.
- ITC reported 18.7% spurt in its Q4FY19 net profit to Rs 3,482 crore on the back of strong sales from the FMCG and cigarette units. The revenue of the company was up 13% at Rs 11,992 crore against Rs 10,587 crore.
- Godrej Industries' consolidated net profit surged 108.33% to Rs 297.41 crore on 40.32% rise in total income to Rs 3,444.36 crore in Q4 March 2019 over Q4 March 2018.
- Indian Acrylics' consolidated net profit rose 76.98% to Rs 4.69 crore on 73.47% rise in total income to Rs 249.34 crore in Q4 March 2019 over Q4 March 2018.

**Indian Economy:** Domestic passenger vehicle (PV) sales declined 17% to 2,47,541 units in April from 2,98,504 units in the year-ago month. Domestic car sales declined 19.93 per cent to 1,60,279 units compared to 2,00,183 in April 2018, according to data released by the Society of Indian Automobile Manufacturers (SIAM). The two-wheeler sales in April declined 16.36 per cent to 16,38,388 units compared to 19,58,761 units in the year-ago month. India needs to actively encourage Foreign Direct Investment (FDI) in Petrochemical sector rather than Free Trade Agreements (FTAs) to utilize India's growing demand to create value within the country rather than outside, noted a latest update from FICCI. India's inflation rate for the month of April 2019 increased marginally to 2.92% vs 2.86%, hitting its six month high.

**Global Economy:** US President Donald Trump has denied that US consumers will pay for higher tariffs on Chinese imports and has warned China not to follow suit. China also announced that it was raising tariffs on \$60 billion of US goods after the latest increase in American tariffs on its exports. The US more than doubled tariffs on \$200 billion of Chinese goods on Friday, following a sharp escalation of their trade war. Trump said China had taken so advantage of the US for so many years and that it should not retaliate. Japan's leading index reached its lowest level since mid-2016, preliminary data from the Cabinet Office showed Monday. The leading index, which measures the future economic activity, declined to 96.3 in March from 97.1 in February. Australia's lending to households declined in March, data from the Australian Bureau of Statistics showed Monday. The number of loans to owner occupied dwellings decreased by a seasonally adjusted 2.8 percent from the previous month.

**Global Equities:** Sentiments continued to be nervous at the start of the week. Steep decline in Copper made investors worried about course of global economy. DOW fell more than 2%.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(178.6)	21.1	118.1
MF(INR cr)	1,245.6	479.0	(48.0)

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,658	24,981	32,036
F&O(INR cr)	720,743	1,174,088	1,183,259

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.0	16.7	13.9
NSE VIX	27.4	25.7	22.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,660	(1.3) %	(5.5) %	Energy	15,172	(2.1) %	(8.2) %
IT	15,955	0.0 %	0.7 %	Pharma	8,554	(4.4) %	(8.8) %
Metals	2,821	(1.8) %	(9.1) %	Finance	12,180	(0.6) %	(2.6) %
Auto	7,939	(1.9) %	(5.7) %	PSU	2,871	(5.0) %	(15.2) %
FMCG	29,061	(1.0) %	(3.7) %	Real Estate	246	(1.9) %	(7.8) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vodafone I	14	2.8 %	(18.6) %	Sun Pharma	398	(9.1) %	(16.9) %
P & G Hygi	10,635	2.4 %	(1.4) %	Eicher Mot	18,752	(7.9) %	(6.5) %
Bajaj Hold	3,106	1.5 %	(7.3) %	Zee Entert	342	(7.9) %	(20.8) %
Interglobe	1,557	1.3 %	9.9 %	Cadila Hea	269	(7.1) %	(21.9) %
Bharti Inf	265	1.2 %	(15.5) %	Bank of Ba	106	(6.9) %	(20.3) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Conditions (APR)	14-05-2019	1:30	AUD	-	7
NAB Business Confidence (APR)	14-05-2019	1:30	AUD	-	0
Teranet/National Bank HP Index (APR)	14-05-2019	12:30	CAD	-	222.3
Teranet/National Bank HPI (MoM) (APR)	14-05-2019	12:30	CAD	-	(0.003)
Teranet/National Bank HPI (YoY) (APR)	14-05-2019	12:30	CAD	-	0.015
Producer & Import Prices (MoM) (APR)	14-05-2019	6:30	CHF	-	0.003
Producer & Import Prices (YoY) (APR)	14-05-2019	6:30	CHF	-	(0.002)
German Consumer Price Index (MoM) (APR F)	14-05-2019	6:00	EUR	-	0.01
German Consumer Price Index (YoY) (APR F)	14-05-2019	6:00	EUR	-	0.02
German Wholesale Price Index (MoM) (APR)	14-05-2019	6:00	EUR	-	0.003
German Wholesale Price Index (YoY) (APR)	14-05-2019	6:00	EUR	-	0.018
Euro-Zone Industrial Production s.a. (MoM) (MAR)	14-05-2019	9:00	EUR	-	(0.002)
Euro-Zone Industrial Production w.d.a. (YoY) (MAR)	14-05-2019	9:00	EUR	-	(0.003)
Euro-Zone ZEW Survey (Economic Sentiment) (MAY)	14-05-2019	9:00	EUR	-	4.5
German ZEW Survey Current Situation (MAY)	14-05-2019	9:00	EUR	-	5.5
German ZEW Survey Expectations (MAY)	14-05-2019	9:00	EUR	-	3.1
Average Weekly Earnings (3M/YoY) (MAR)	14-05-2019	8:30	GBP	-	0.035
Claimant Count Rate (APR)	14-05-2019	8:30	GBP	-	0.03
Employment Change 3M/3M (MAR)	14-05-2019	8:30	GBP	-	-
ILO Unemployment Rate 3Mths (MAR)	14-05-2019	8:30	GBP	-	0.039
Jobless Claims Change (APR)	14-05-2019	8:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (MAR)	14-05-2019	8:30	GBP	-	0.034
Japan Money Stock M2+CD (YoY) (APR)	14-05-2019	23:50	JPY	-	0.024
Japan Money Stock M3 (YoY) (APR)	14-05-2019	23:50	JPY	-	0.021
Eco Watchers Survey Current (APR)	14-05-2019	5:00	JPY	-	44.8
Eco Watchers Survey Outlook SA (APR)	14-05-2019	5:00	JPY	-	48.6
NFIB Small Business Optimism (APR)	14-05-2019	10:00	USD	-	101.8
Export Price Index (MoM) (APR)	14-05-2019	12:30	USD	-	0.007
Export Price Index (YoY) (APR)	14-05-2019	12:30	USD	-	0.007



Import Price Index (MoM) (APR)	14-05-2019	12:30	USD	-	0.006
Import Price Index (YoY) (APR)	14-05-2019	12:30	USD	-	0
Import Price Index ex Petroleum (MoM) (APR)	14-05-2019	12:30	USD	-	0.002
Fed's George Speaks to Economic Club of Minnesota	14-05-2019	16:45	USD	-	-
Fed's Daly Speaks at Northwestern University	14-05-2019	22:00	USD	-	-
Fed's Williams Speaks at SNB/IMF Event in Zurich	14-05-2019	7:15	USD	-	-

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