



15 Apr.2019

**INDEX PERFORMANCE**

| INDIAN INDICES     | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| CNX NIFTY          | 11,643 | 0.4 %   | (0.2) % |
| BSE SENSEX         | 38,767 | 0.4 %   | (0.3) % |
| CNX BANK           | 29,939 | 0.5 %   | (1.3) % |
| CNX MIDCAP         | 18,168 | 0.4 %   | (0.9) % |
| CNX SMALLCAP       | 6,740  | 0.7 %   | 0.0 %   |
| GLOBAL INDICES     | LATEST | % 1D    | % YTD   |
| DOW JONES          | 26,412 | 1.0 %   | 13.2 %  |
| S&P 500            | 2,907  | 0.7 %   | 16.0 %  |
| FTSE 100           | 7,437  | 0.3 %   | 10.4 %  |
| HANG SENG          | 29,910 | 0.2 %   | 19.0 %  |
| NIKKEI             | 21,871 | 0.7 %   | 11.8 %  |
| SHANGHAI COMPOSITE | 3,189  | (0.0) % | 29.3 %  |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 69.26  | 0.2 %   | (0.3) % |
| EUR/USD | 1.13   | 0.3 %   | (1.3) % |
| GBP/USD | 1.31   | (0.0) % | 2.6 %   |
| USD/JPY | 111.92 | 0.5 %   | 2.1 %   |
| USD/AUD | 1.40   | (0.2) % | (1.7) % |
| USD/SGD | 1.35   | 0.0 %   | (0.8) % |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 64     | 0.5 %   | 37.3 %  |
| Gold(INR/10g)      | 31,673 | (0.3) % | 0.5 %   |
| Gold Comex(USD/oz) | 1,290  | 0.0 %   | (0.0) % |
| SILVER(INR/1Kg)    | 37,235 | (0.1) % | (2.7) % |
| Aluminium(USD/MT)  | 1,844  | (0.2) % | (0.8) % |
| Copper(USD/MT)     | 6,490  | 0.9 %   | 11.1 %  |

**FIXED INCOME**

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 2.6    | 0.1 %  | (0.1) % |

**Global Economy:** Global finance leaders gathered for the spring meetings of the International Monetary Fund and the World Bank noted that the global economy has lost momentum this year. But they expect growth to pick up in the second half of 2019, as central bankers ease up on interest rates. After reporting a notable improvement in US consumer sentiment in the previous month, the University of Michigan released a report showing sentiment has deteriorated by more than anticipated in the month of April. The preliminary report showed the consumer sentiment index dropped to 96.9 in April from the final March reading of 98.4. The decrease by the headline index reflected less optimism about the economic outlook, as the index of consumer expectations slid to 85.8 in April from 88.8 in March. On the other hand, the report said the current economic conditions index inched up to 114.2 in April from 113.3 in the previous month. Eurozone industrial production fell 0.2% month-on-month in February, following a 1.9% rise in January. On a year-on-year basis, industrial production eased 0.3% after a 0.7% tumble in January. Chinese export growth rebounded to a five-month high. Official data showed that China's exports increased 14.2% in March from a year earlier. Imports fell an annual 7.6% following February's 5.2% drop.

**Global Equities:** US stocks gained on Friday as sentiments were supported on good buying. Dow jumped 1%, the S&P 500 rose 0.7% and the Nasdaq edged up 0.5%. Commodities also recovered after a tumble on Thursday.

**Indian Economy:** India's industrial production (base year 2011-12=100) growth moderated sharply to 20-month low of mere 0.1% in February 2019, compared with 1.4% growth recorded in January 2019. The industrial production growth for January 2019 has been revised downwards from 1.7% increase reported provisionally. The all-India general CPI inflation rose to 2.86% in March 2019 (new base 2012=100), compared with 2.57% in February 2019. The corresponding provisional inflation rate for rural area was 1.80% and urban area 4.10% in March 2019 as against 1.81% and 3.43% in February 2019. However, the core CPI inflation eased to 5.02% in March 2019 compared with 5.29% in February 2019. The cumulative CPI inflation has declined to 3.41% in April-March FY2019 compared with 3.59% in April-March FY2018. As per the latest data on outward foreign direct investment released by the Reserve Bank of India (RBI), the foreign investment of Indian companies moved up 18% to US\$ 2.69 billion in March 2018 from US\$ 2.28 billion in March 2018.

**Equity Markets:** An impressive spurt in late trades pushed up the local markets in last session. Key benchmark indices logged modest gains on steady buying demand in index pivotals. FMCG stocks gained. The barometer index, the S&P BSE Sensex, rose 160.10 points or 0.41% at 38,767.11. The Nifty 50 index rose 46.75 points or 0.4% at 11,643.45.

**Corporate News:** TCS' Q4 revenue rose 8.5% year-on-year to \$5.39 billion. The net profit was up 7.8% at \$1.15 billion. TCS crossed \$20 billion in annual revenue. TCS continued to give strong margins, clocking a rate of 25.1% in last quarter. TCS management also brushed aside concerns on the impact of H-1B visa changes. Infosys' Q4 revenue went up 9.1% on year to \$3.06 billion. The company delivered on the top end of its 9% annual revenue growth outlook in constant currency terms, the outlook having been increased from 6-8% in the last quarter. It also delivered on the Ebit margin outlook for FY19 with the metric coming at 22.8%, slightly towards the lower end of the guidance of 22-24%.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 147.4         | 213.6      | 213.6      |
| MF(INR cr)  | 267.2         | (245.2)    | (245.2)    |

### MARKET TURNOVER

|              | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 31,163        | 36,149         | 36,149         |
| F&O(INR cr)  | 582,652       | 1,075,225      | 1,075,225      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 12.0          | 13.3           | 13.3           |
| NSE VIX  | 21.0          | 19.5           | 19.5           |

### NSE INDICES / SECTORAL PERFORMANCE

|        | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |             | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks  | 29,939        | 0.5 %       | (1.3) %      | Energy      | 16,170        | 0.1 %       | (2.2) %      |
| IT     | 15,911        | 0.2 %       | 0.4 %        | Pharma      | 9,426         | 0.4 %       | 0.5 %        |
| Metals | 3,072         | 0.1 %       | (1.0) %      | Finance     | 12,496        | 0.4 %       | (0.0) %      |
| Auto   | 8,777         | 1.0 %       | 4.3 %        | PSU         | 3,302         | 0.8 %       | (2.4) %      |
| FMCG   | 30,534        | 1.3 %       | 1.1 %        | Real Estate | 276           | 0.3 %       | 3.2 %        |

### 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| B H E L            | 78            | 4.5 %       | 2.3 %        | Indiabulls        | 830           | (1.9) %     | (2.0) %      |
| GAIL (Indi)        | 357           | 4.1 %       | 0.6 %        | I O C L           | 155           | (1.6) %     | (2.1) %      |
| ITC                | 306           | 3.2 %       | 2.9 %        | Colgate-Pa        | 1,212         | (1.5) %     | (3.7) %      |
| Lupin              | 833           | 2.9 %       | 8.7 %        | Havells In        | 743           | (1.4) %     | (4.3) %      |
| HDFC Life          | 405           | 2.9 %       | 5.6 %        | United Spi        | 547           | (1.3) %     | (0.4) %      |

### EVENTS CALENDAR

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

..... End of Report .....