



15 May.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,807	0.0 %	5.8 %
BSE SENSEX	35,557	0.1 %	6.9 %
CNX BANK	26,475	0.2 %	8.8 %
CNX MIDCAP	19,275	(1.2) %	0.9 %
CNX SMALLCAP	7,993	(1.3) %	0.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,899	0.3 %	0.3 %
S&P 500	2,730	0.1 %	1.3 %
FTSE 100	7,711	(0.2) %	0.8 %
HANG SENG	31,541	1.4 %	3.4 %
NIKKEI	22,866	0.5 %	(2.7) %
SHANGHAI COMPOSITE	3,174	0.3 %	(5.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	67.33	0.0 %	5.8 %
EUR/USD	1.19	0.2 %	(0.6) %
GBP/USD	1.35	0.1 %	0.2 %
USD/JPY	109.40	0.0 %	(3.0) %
USD/AUD	1.33	(0.1) %	3.7 %
USD/SGD	1.34	(0.0) %	0.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	(0.9) %	17.1 %
Gold(INR/10g)	31,427	0.2 %	7.0 %
Gold Comex(USD/oz)	1,318	(0.1) %	0.7 %
SILVER(INR/1Kg)	39,956	0.7 %	3.5 %
Aluminium(USD/MT)	2,274	(2.3) %	0.8 %
Copper(USD/MT)	6,869	0.1 %	(4.3) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

**Global Economy:** Industrial output in China was up 7% on year in April following 6% in March, the National Bureau of Statistics said on Tuesday. The bureau also said that retail sales advanced an annual 9.4% - down from 10.1% in the previous month. Fixed asset investment rose 7% on year, down from 7.5% a month earlier.

**Global Equities:** US stocks closed flat as the 10-year Treasury yield hit 3% while investors assessed the outlook for trade relations and tensions in the Middle East.

**Indian Economy:** The all-India general CPI inflation increased to 4.58% in April 2018 (new base 2012=100), compared with 4.28% in March 2018, snapping consistent moderation for last three months. The corresponding provisional inflation rate for rural area was 4.67% and urban area 4.42% in April 2018 as against 4.44% and 4.12% in March 2018. The core CPI inflation increased to 5.80% in April 2018 compared with 5.23% in March 2018. The cumulative CPI inflation had declined to 3.59% in April-April FY2018 compared with 4.52% in April-April FY2017.

**Equity Markets:** Local indices settled almost flat as investors were cautious ahead of Karnataka Assembly poll results today. Domestic stocks drifted higher in early trade on positive Asian stocks. Early sentiment was also boosted after exit polls reportedly showed that the Bharatiya Janata Party could emerge as the single largest party in Karnataka. Key benchmark indices extended gains and hit fresh intraday high in morning trade. Stocks trimmed gains in mid-morning trade. Indices hit fresh intraday low in afternoon trade. Key benchmark indices hovered in a small range in mid-afternoon trade. Stock cut losses in late trade and regained positive zone.

**Corporate News:** Net profit of Hindustan Unilever (HUL) rose 14.20% to Rs 1351 crore on 11.15% rise in net sales to Rs 9003 crore in Q4 March 2018 over Q4 March 2017. Wipro Gallagher Solutions (WGS), a Wipro company and a leading provider of loan origination software solutions, and Precision Risk Management Systems, Inc. (PRMS), a leading provider of performance management solutions, announced that they have partnered to deliver advanced mortgage business intelligence (BI) and customer experience management solutions to mortgage lenders. Bombay Dyeing & Manufacturing Company reported net profit of Rs 142 crore Q4 March 2018 compared with net loss of Rs 43.44 crore in Q4 March 2017. Net sales rose 43.97% to Rs 757.76 crore in Q4 March 2018 over Q4 March 2017. Net profit of Honeywell Automation rose 167.02% to Rs 58.37 crore on 8% rise in net sales to Rs 639.76 crore in Q4 March 2018 over Q4 March 2017.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(45.4)	(63.8)	(51.5)
MF(INR cr)	659.9	378.7	469.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,526	33,711	33,882
F&O(INR cr)	404,390	637,504	711,925

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.7	14.5	17.1
NSE VIX	14.3	13.8	13.9

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,475	0.2 %	8.8 %	Energy	14,071	0.2 %	5.9 %
IT	13,446	(0.2) %	5.8 %	Pharma	8,462	0.2 %	(1.8) %
Metals	3,702	(0.3) %	4.6 %	Finance	11,008	0.2 %	7.3 %
Auto	11,274	(0.9) %	1.9 %	PSU	2,863	0.7 %	0.3 %
FMCG	28,437	(0.1) %	7.3 %	Real Estate	307	(0.7) %	3.6 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun TV Net	963	10.9 %	12.0 %	Ashok Leyl	155	(4.1) %	4.8 %
NTPC	172	2.5 %	0.7 %	Power Fin.	80	(3.9) %	(8.6) %
Interglobe	1,188	2.1 %	(10.6) %	Titan Comp	920	(3.8) %	(2.6) %
JSW Steel	329	1.6 %	11.0 %	DLF	206	(3.6) %	2.7 %
Dr Reddy's	2,018	1.4 %	(5.4) %	B H E L	78	(3.6) %	(5.7) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA May Meeting Minutes	15-05-2018	1:30	AUD	-	-
RBA's Debelle Speech to HK Forum Via Video Link	15-05-2018	1:40	AUD	-	-
Existing Home Sales (MoM) (APR)	15-05-2018	13:00	CAD	-	0.013
Producer & Import Prices (MoM) (APR)	15-05-2018	7:15	CHF	-	(0.002)
Producer & Import Prices (YoY) (APR)	15-05-2018	7:15	CHF	-	0.02
Fixed Assets Ex Rural YTD (YoY) (APR)	15-05-2018	2:00	CNY	-	0.075
Industrial Production (YoY) (APR)	15-05-2018	2:00	CNY	-	0.06
Industrial Production YTD (YoY) (APR)	15-05-2018	2:00	CNY	-	0.068
Retail Sales (YoY) (APR)	15-05-2018	2:00	CNY	-	0.101
Retail Sales YTD (YoY) (APR)	15-05-2018	2:00	CNY	-	0.098
Surveyed Jobless Rate (APR)	15-05-2018	2:00	CNY	-	0.051
German Gross Domestic Product n.s.a. (YoY) (1Q P)	15-05-2018	6:00	EUR	-	0.023
German Gross Domestic Product s.a. (QoQ) (1Q P)	15-05-2018	6:00	EUR	-	0.006
German Gross Domestic Product w.d.a. (YoY) (1Q P)	15-05-2018	6:00	EUR	-	0.029
Euro-Zone Gross Domestic Product s.a. (QoQ) (1Q P)	15-05-2018	9:00	EUR	-	0.004
Euro-Zone Gross Domestic Product s.a. (YoY) (1Q P)	15-05-2018	9:00	EUR	-	0.025
Euro-Zone Industrial Production s.a. (MoM) (MAR)	15-05-2018	9:00	EUR	-	(0.008)
Euro-Zone Industrial Production w.d.a. (YoY) (MAR)	15-05-2018	9:00	EUR	-	0.029
Euro-Zone ZEW Survey (Economic Sentiment) (MAY)	15-05-2018	9:00	EUR	-	1.9
German ZEW Survey Current Situation (MAY)	15-05-2018	9:00	EUR	-	87.9
German ZEW Survey Expectations (MAY)	15-05-2018	9:00	EUR	-	(8.2)
Average Weekly Earnings (3M/YoY) (MAR)	15-05-2018	8:30	GBP	-	0.028
Claimant Count Rate (APR)	15-05-2018	8:30	GBP	-	0.024
Employment Change 3M/3M (MAR)	15-05-2018	8:30	GBP	-	-
ILO Unemployment Rate 3Mths (MAR)	15-05-2018	8:30	GBP	-	0.042
Jobless Claims Change (APR)	15-05-2018	8:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (MAR)	15-05-2018	8:30	GBP	-	0.028
Gross Domestic Product Annualized s.a. (QoQ) (1Q P)	15-05-2018	23:50	JPY	-	0.016
Gross Domestic Product Business Spending (QoQ) (1Q P)	15-05-2018	23:50	JPY	-	0.01



Gross Domestic Product Deflator (YoY) (1Q P)	15-05-2018	23:50	JPY	-	0.001
Gross Domestic Product Private Consumption (QoQ) (1Q P)	15-05-2018	23:50	JPY	-	0.005
Gross Domestic Product s.a. (QoQ) (1Q P)	15-05-2018	23:50	JPY	-	0.004
Nominal Gross Domestic Product (QoQ) (1Q P)	15-05-2018	23:50	JPY	-	0.003
Tertiary Industry Index (MoM) (MAR)	15-05-2018	4:30	JPY	-	0
Fed's Kaplan discusses Outlook for Energy Market, Economy	15-05-2018	12:00	USD	-	-
Empire Manufacturing (MAY)	15-05-2018	12:30	USD	-	15.8
Retail Sales Advance (MoM) (APR)	15-05-2018	12:30	USD	-	0.006
Retail Sales Control Group (APR)	15-05-2018	12:30	USD	-	0.004
Retail Sales Ex Auto (MoM) (APR)	15-05-2018	12:30	USD	-	0.002
Retail Sales Ex Auto and Gas (APR)	15-05-2018	12:30	USD	-	0.003
Business Inventories (MAR)	15-05-2018	14:00	USD	-	0.006
Fed Nominees Clarida and Bowman Testify Before Senate Panel	15-05-2018	14:00	USD	-	-
NAHB Housing Market Index (MAY)	15-05-2018	14:00	USD	-	69
U.S. to Sell 4-Week Bills	15-05-2018	15:30	USD	-	-
Fed's Williams to Speak at Economic Club of Minnesota	15-05-2018	17:00	USD	-	-
Net Long-term TIC Flows (MAR)	15-05-2018	20:00	USD	-	-
Total Net TIC Flows (MAR)	15-05-2018	20:00	USD	-	-

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