



15 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,222	0.0 %	(3.8) %
BSE SENSEX	37,319	0.6 %	(4.0) %
CNX BANK	28,829	0.0 %	(4.9) %
CNX MIDCAP	16,737	0.0 %	(8.7) %
CNX SMALLCAP	6,143	0.0 %	(8.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,532	0.8 %	9.5 %
S&P 500	2,834	0.8 %	13.1 %
FTSE 100	7,242	1.1 %	7.5 %
HANG SENG	28,122	(1.5) %	11.9 %
NIKKEI	21,067	(0.6) %	7.7 %
SHANGHAI COMPOSITE	2,884	(0.7) %	17.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.44	0.7 %	1.4 %
EUR/USD	1.12	0.0 %	(1.9) %
GBP/USD	1.30	(0.2) %	1.9 %
USD/JPY	109.47	(0.3) %	(0.1) %
USD/AUD	1.44	0.5 %	1.1 %
USD/SGD	1.37	0.4 %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	(1.0) %	31.2 %
Gold(INR/10g)	32,245	0.9 %	2.3 %
Gold Comex(USD/oz)	1,300	1.0 %	0.7 %
SILVER(INR/1Kg)	37,181	0.6 %	(2.8) %
Aluminium(USD/MT)	1,766	0.0 %	(5.0) %
Copper(USD/MT)	6,043	(1.5) %	3.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	(0.1) %	(0.2) %

Global Economy: China's industrial production advanced 5.4% year-on-year in April, following March's 8.5% increase. Annual growth in retail sales eased to 7.2% from 8.7% a month ago. The fixed asset investment rose 6.1% during January to April period compared to the 6.3% growth in January to March period. Euro area industrial production fell in March with big declines in most of the single currency bloc's largest economies. According to Eurostat, industrial production in the Eurozone dipped by 0.3% month-on-month and by 0.6% year-on-year. Germany's economic sentiment weakened in May, survey data from the ZEW-Leibniz Centre for European Economic Research showed on Tuesday. The economic sentiment index fell to -2.1 in May from +3.1 in April. The current conditions index rose more-than-expected to 8.2 from 5.5 points a month ago. UK ILO jobless rate came in at 3.8% in the first quarter, while the rate was expected to remain unchanged at 3.9%, the Office for National Statistics reported. The jobless rate declined in the first quarter to the lowest since 1974, signaling continuing firming of the labor market. In the three months to March, the number of people who were unemployed decreased by 65,000 to 1.3 million. This was the largest quarterly decrease since September to November 2016. At the same time, the employment rate came in at 76.1%, the joint-highest since comparable records began in 1971. Germany's consumer price inflation rose to 2% in April from 1.3% in March, final data from Destatis showed. This was the highest rate since November, when prices were up 2.1%. Month-on-month, consumer price inflation increased to 1%. Australia business conditions dropped to +3 in April from +7 in March, survey data from the National Australia Bank showed. The confidence index rose 1 point to zero in April. As the confidence indicator remained below average, it suggested little improvement in business conditions in coming months.

Global Equities: Sentiments were mixed as equities tried to recoup some of the hefty losses witnessed at the start of week on overwhelming global trade concerns.

Indian Economy: FICCI's latest 'Quarterly Survey on Manufacturing' highlights a continued positive sentiment for manufacturing sector in Q4 of 2018-19. Overall sentiment in the manufacturing sector remains positive as the proportion of respondents reporting higher output growth (around 54%) during the January-March 2018-19 has remained same as compared to Q-3 of 2018-19, noted FICCI Survey. First time in last many quarters, the overall capacity utilization in manufacturing has witnessed an increase to 80% in Q-4 2018-19. It was hovering at 75% for last many quarters, as per the survey. Wholesale price-based inflation slipped to 3.07% in April on cheaper fuel and manufactured items, even as prices of food articles remained high. The Wholesale Price Index- (WPI-) based inflation was at 3.18% in March. Inflation in food articles basket was 7.37%, up from 5.68% in the previous month.

Equity Markets: Bargain buying supported local stocks amid volatile trade. The Nifty 50 added 0.66% to close at 11222.05 while the SENSEX increased 0.61% to close at 37318.53. Nifty PSU Bank index ended up 2.85% at 2953.3. In other indices, Nifty Infrastructure index gained 1.98% and Nifty Pharma index added 1.52% on the day.

Corporate News: Torrent Power May has raised Rs 270 crore by issuing non-convertible debentures on private placement basis. The rated, taxable, unsecured, listed, redeemable NCDs were issued at coupon rate of 10.25% on private placement basis. Glenmark Pharmaceuticals on has received final approval from the US health regulator for a generic version of AstraZeneca's Nexium, used to treat acid reflux. Nestle India reported 9.26% rise in net profit to Rs 463.28 crore on 9.33% rise in total income to Rs 3076.14 crore in Q1 March 2019 over Q1 March 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(135.6)	1.5	108.7
MF(INR cr)	1,245.6	479.0	(48.0)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,350	26,356	32,225
F&O(INR cr)	1,068,438	1,162,349	1,179,158

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.6	17.1	14.1
NSE VIX	27.1	25.8	22.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,829	0.6 %	(4.9) %	Energy	15,399	1.5 %	(6.9) %
IT	15,763	(1.2) %	(0.5) %	Pharma	8,684	1.5 %	(7.4) %
Metals	2,838	0.6 %	(8.5) %	Finance	12,226	0.4 %	(2.2) %
Auto	7,956	0.2 %	(5.5) %	PSU	2,953	2.9 %	(12.7) %
FMCG	29,235	0.6 %	(3.2) %	Real Estate	248	0.8 %	(7.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
B H E L	64	6.9 %	(15.8) %	S A I L	48	(5.9) %	(13.3) %
Indiabulls	697	5.8 %	(17.7) %	Tech Mahin	790	(3.3) %	0.6 %
Bharti Air	337	5.6 %	7.6 %	Vodafone I	14	(3.1) %	(21.1) %
Sun Pharma	419	5.4 %	(12.4) %	Cadila Hea	261	(3.1) %	(24.3) %
Vedanta	161	4.2 %	(14.9) %	HDFC Life	391	(2.9) %	1.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (MAY)	15-05-2019	0:30	AUD	-	100.7
Westpac Consumer Confidence (MAY)	15-05-2019	0:30	AUD	-	0.019
Wage Price Index (QoQ) (1Q)	15-05-2019	1:30	AUD	-	0.005
Wage Price Index (YoY) (1Q)	15-05-2019	1:30	AUD	-	0.023
Consumer Price Index (APR)	15-05-2019	12:30	CAD	-	135.4
Consumer Price Index (YoY) (APR)	15-05-2019	12:30	CAD	-	0.019
Consumer Price Index Core (YoY) (APR)	15-05-2019	12:30	CAD	-	0.018
Consumer Price Index n.s.a. (MoM) (APR)	15-05-2019	12:30	CAD	-	0.007
CPI Core - Median (YoY) (APR)	15-05-2019	12:30	CAD	-	0.02
CPI Core - Trim (YoY) (APR)	15-05-2019	12:30	CAD	-	0.021
Existing Home Sales (MoM) (APR)	15-05-2019	13:00	CAD	-	0.009
Fixed Assets Ex Rural YTD (YoY) (APR)	15-05-2019	2:00	CNY	-	0.063
Industrial Production (YoY) (APR)	15-05-2019	2:00	CNY	-	0.085
Industrial Production YTD (YoY) (APR)	15-05-2019	2:00	CNY	-	0.065
Property Investment YTD (YoY) (APR)	15-05-2019	2:00	CNY	-	0.118
Retail Sales (YoY) (APR)	15-05-2019	2:00	CNY	-	0.087
Retail Sales YTD (YoY) (APR)	15-05-2019	2:00	CNY	-	0.083
Surveyed Jobless Rate (APR)	15-05-2019	2:00	CNY	-	0.052
ECB's Coeure Speaks in Paris	15-05-2019	14:15	EUR	-	-
ECB's Praet Speaks in Brussels	15-05-2019	16:30	EUR	-	-
German Gross Domestic Product n.s.a. (YoY) (1Q P)	15-05-2019	6:00	EUR	-	0.009
German Gross Domestic Product s.a. (QoQ) (1Q P)	15-05-2019	6:00	EUR	-	0
German Gross Domestic Product w.d.a. (YoY) (1Q P)	15-05-2019	6:00	EUR	-	0.006
Euro-Zone Employment (QoQ) (1Q P)	15-05-2019	9:00	EUR	-	0.003
Euro-Zone Employment (YoY) (1Q P)	15-05-2019	9:00	EUR	-	0.013
Euro-Zone Gross Domestic Product s.a. (QoQ) (1Q P)	15-05-2019	9:00	EUR	-	0.004
Euro-Zone Gross Domestic Product s.a. (YoY) (1Q P)	15-05-2019	9:00	EUR	-	0.012
BOJ Outright Bond Purchase 5~10 Years	15-05-2019	1:10	JPY	-	-
Domestic Company Credit Default Index (MoM) (APR)	15-05-2019	22:50	IND	-	0.002



Domestic Corporate Goods Price Index (YoY) (APR)	15-05-2019	23:50	JPY	-	0.013
Foreign Buying Japan Bonds (MAY 10)	15-05-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAY 10)	15-05-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAY 10)	15-05-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAY 10)	15-05-2019	23:50	JPY	-	-
Loans & Discounts Corp (YoY) (MAR)	15-05-2019	23:50	JPY	-	0.033
Machine Tool Orders (YoY) (APR P)	15-05-2019	6:00	JPY	-	(0.285)
MBA Mortgage Applications (MAY 10)	15-05-2019	11:00	USD	-	0.027
Empire Manufacturing (MAY)	15-05-2019	12:30	USD	-	10.1
Retail Sales Advance (MoM) (APR)	15-05-2019	12:30	USD	-	0.016
Retail Sales Control Group (APR)	15-05-2019	12:30	USD	-	0.01
Retail Sales Ex Auto (MoM) (APR)	15-05-2019	12:30	USD	-	0.012
Retail Sales Ex Auto and Gas (APR)	15-05-2019	12:30	USD	-	0.009
Capacity Utilization (APR)	15-05-2019	13:15	USD	-	0.788
Industrial Production (MoM) (APR)	15-05-2019	13:15	USD	-	(0.001)
Manufacturing (SIC) Production (APR)	15-05-2019	13:15	USD	-	0
Fed's Quarles testifies Before Senate Banking Panel	15-05-2019	13:30	USD	-	-
Business Inventories (MAR)	15-05-2019	14:00	USD	-	0.003
NAHB Housing Market Index (MAY)	15-05-2019	14:00	USD	-	63
DOE Cushing OK Crude Inventory (MAY 10)	15-05-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAY 10)	15-05-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (MAY 10)	15-05-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (MAY 10)	15-05-2019	14:30	USD	-	-
Fed's Barkin Speaks to Economists in New York	15-05-2019	16:00	USD	-	-
Net Long-term TIC Flows (MAR)	15-05-2019	20:00	USD	-	-
Total Net TIC Flows (MAR)	15-05-2019	20:00	USD	-	-

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