



16 May.2018

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,725	(0.7) %	5.0 %
BSE SENSEX	35,544	(0.0) %	6.2 %
CNX BANK	26,194	(1.1) %	7.7 %
CNX MIDCAP	18,954	(0.7) %	(0.7) %
CNX SMALLCAP	7,853	(0.7) %	(1.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,706	(0.8) %	(0.5) %
S&P 500	2,711	(0.7) %	0.6 %
FTSE 100	7,723	0.2 %	1.0 %
HANG SENG	31,152	(1.2) %	2.1 %
NIKKEI	22,818	(0.2) %	(2.9) %
SHANGHAI COMPOSITE	3,192	0.6 %	(4.7) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.11	1.2 %	7.0 %
EUR/USD	1.18	(1.0) %	(1.5) %
GBP/USD	1.35	(0.3) %	(0.1) %
USD/JPY	110.24	0.8 %	(2.2) %
USD/AUD	1.34	1.0 %	4.7 %
USD/SGD	1.34	0.5 %	0.6 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	0.5 %	18.1 %
Gold(INR/10g)	31,342	(0.3) %	6.8 %
Gold Comex(USD/oz)	1,293	(1.6) %	(1.2) %
SILVER(INR/1Kg)	39,635	(0.8) %	2.7 %
Aluminium(USD/MT)	2,313	1.2 %	2.5 %
Copper(USD/MT)	6,823	(0.1) %	(5.0) %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.1 %	0.6 %

**Global Economy:** US homebuilder confidence improved in the month of May, according to a report released by the National Association of Home Builders on Tuesday. The report said the NAHB/Wells Fargo Housing Market Index rose to 70 in May from a downwardly revised 68 in April. Retail sales in the US increased. The Commerce Department said retail sales edged up by 0.3% in April after climbing by an upwardly revised 0.8% in March. The New York Fed said its general business conditions index spiked to 20.1 in May from 15.8 in April, with a positive reading indicating growth in regional manufacturing activity

**Global Equities:** US stocks tumbled amid heavy profit selling after recent surge. The modest gains posted on Monday had lifted the major averages to their best closing levels in two months.

**Indian Economy:** Atal Pension Yojana (APY) Scheme's subscriber base crossed 1 crore on completion of 3 years of the Scheme launch. APY was launched by the Prime Minister of India, Narendra Modi at a function in Kolkata on 9th May, 2015 and the current number of subscribers stands at 1.10 Crore. Atal Pension Yojana (APY), a guaranteed Pension Scheme for citizens of India announced by the Government of India, is focused on the unorganised sector workers which constitute more than 85% of workforce. Under the APY, the guaranteed minimum pension of Rs. 1,000/- or 2,000/- or 3,000/- or 4,000/- or 5,000/- per month will be given at the age of 60 years depending on the contributions by the subscribers.

**Equity Markets:** Key indices ended almost flat, erasing strong intraday gains, after Bhartiya Janata Party's lead decreased from the halfway mark in the Karnataka Assembly election results. The new alliance equations is in the offing as BJP fell short of majority after initial leads in the ongoing Karnataka Assembly election results. Media reports suggested that the Congress has offered to support Janata Dal (Secular), or JDS, and project H.D. Kumaraswamy as the state's next chief minister.

**Corporate News:** Britannia Industries' net profit increased 25% to Rs 264 crore on 13% increase in (comparable) revenue to Rs 2510 crore in Q4 March 2018 over Q4 March 2017. Profit from operations increased 29% to Rs 355 crore in Q4 March 2018 over Q4 March 2017. Indiabulls Real Estate announced that a meeting of the board of directors of the company will be held on Friday, 18 May 2018, to consider the proposal of buyback of equity shares. Reliance Communications (RCom) and two of its subsidiaries Reliance Telecom and Reliance Infratel, await the detailed orders of the National Company Law Tribunal (NCLT), Mumbai, allowing the Ericsson application for admitting the companies to debt resolution under IBC. The companies will decide the next course of action after studying the orders. EPC Industrie has announced a joint venture (JV) with an Israeli Greenhouse firm Top Greenhouses. EPC will hold 60% stake in the JV while Top will hold remaining 40%. The joint venture will bring out the best by combining the ingenuity of Israel to the big Indian market, the firm said.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	122.1	(43.2)	(45.7)
MF(INR cr)	1,132.5	472.9	492.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,741	34,114	34,007
F&O(INR cr)	1,131,489	686,902	725,460

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.6	14.4	16.9
NSE VIX	13.2	13.7	13.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,474	(0.0) %	8.8 %	Energy	14,025	(0.3) %	5.5 %
IT	13,505	0.4 %	6.3 %	Pharma	8,401	(0.7) %	(2.5) %
Metals	3,712	0.3 %	4.9 %	Finance	11,017	0.1 %	7.4 %
Auto	11,187	(0.8) %	1.2 %	PSU	2,795	(2.4) %	(2.1) %
FMCG	28,353	(0.3) %	7.0 %	Real Estate	301	(2.0) %	1.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Avenue Sup	1,485	4.2 %	9.4 %	Tata Motor	181	(5.2) %	(4.5) %
Colgate-Pa	1,152	3.6 %	8.9 %	Bharat Ele	120	(4.4) %	(17.0) %
Siemens	1,055	3.3 %	(4.2) %	Tata Motor	310	(4.2) %	(8.6) %
Idea Cellu	53	2.6 %	(31.7) %	Power Fin.	76	(4.0) %	(12.3) %
Tata Steel	626	2.6 %	8.1 %	Punjab Nat	86	(3.8) %	(10.7) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (MAY)	16-05-2018	0:30	AUD	-	102.4
Westpac Consumer Confidence (MAY)	16-05-2018	0:30	AUD	-	(0.006)
Wage Price Index (QoQ) (1Q)	16-05-2018	1:30	AUD	-	0.006
Wage Price Index (YoY) (1Q)	16-05-2018	1:30	AUD	-	0.021
Manufacturing Sales (MoM) (MAR)	16-05-2018	12:30	CAD	-	0.019
Bank of Canada's Schembri Speaks at the OEA	16-05-2018	16:15	CAD	-	-
SNB's Jordan Speak at Vollgeld Event in Zurich	16-05-2018	16:00	CHF	-	-
New Home Prices (MoM) (APR)	16-05-2018	1:30	CNY	-	0.0042
ECB President Draghi Speaks in Frankfurt	16-05-2018	12:00	EUR	-	-
ECB's Coeure Chairs a Panel in Frankfurt	16-05-2018	12:30	EUR	-	-
ECB's Praet Chairs Panel in Frankfurt	16-05-2018	14:30	EUR	-	-
German Consumer Price Index (MoM) (APR F)	16-05-2018	6:00	EUR	-	0
German Consumer Price Index (YoY) (APR F)	16-05-2018	6:00	EUR	-	0.016
Euro-Zone Consumer Price Index (MoM) (APR)	16-05-2018	9:00	EUR	-	0.01
Euro-Zone Consumer Price Index (YoY) (APR F)	16-05-2018	9:00	EUR	-	0.013
Euro-Zone Consumer Price Index Core (YoY) (APR F)	16-05-2018	9:00	EUR	-	0.007
BOE's John Speaks on Benchmark Reform in Liverpool	16-05-2018	8:10	GBP	-	-
BOJ Outright Bond Purchase 10~25 Years	16-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	16-05-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (MAY 11)	16-05-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAY 11)	16-05-2018	23:50	JPY	-	-
Housing Loans (YoY) (1Q)	16-05-2018	23:50	JPY	-	0.029
Japan Buying Foreign Bonds (Yen) (MAY 11)	16-05-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAY 11)	16-05-2018	23:50	JPY	-	-
Machine Orders (MoM) (MAR)	16-05-2018	23:50	JPY	-	0.021
Machine Orders (YoY) (MAR)	16-05-2018	23:50	JPY	-	0.024
Capacity Utilization (MoM) (MAR)	16-05-2018	4:30	JPY	-	0.013
Industrial Production (MoM) (MAR F)	16-05-2018	4:30	JPY	-	0.012
Industrial Production (YoY) (MAR F)	16-05-2018	4:30	JPY	-	0.022



Producer Price Index Input (QoQ) (1Q)	16-05-2018	22:45	NZD	-	0.009
Producer Price Index Output (QoQ) (1Q)	16-05-2018	22:45	NZD	-	0.01
Non Resident Bond Holdings (APR)	16-05-2018	3:00	NZD	-	0.59
MBA Mortgage Applications (MAY 11)	16-05-2018	11:00	USD	-	(0.004)
Building Permits (APR)	16-05-2018	12:30	USD	-	-
Building Permits (MoM) (APR)	16-05-2018	12:30	USD	-	0.025
Fed's Bostic to Give Economic Update	16-05-2018	12:30	USD	-	-
Housing Starts (APR)	16-05-2018	12:30	USD	-	-
Housing Starts (MoM) (APR)	16-05-2018	12:30	USD	-	0.019
Revisions: Housing Starts	16-05-2018	12:30	USD	-	-
Capacity Utilization (APR)	16-05-2018	13:15	USD	-	0.78
Industrial Production (MoM) (APR)	16-05-2018	13:15	USD	-	0.005
Manufacturing (SIC) Production (APR)	16-05-2018	13:15	USD	-	0.001
DOE Cushing OK Crude Inventory (MAY 11)	16-05-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (MAY 11)	16-05-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (MAY 11)	16-05-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (MAY 11)	16-05-2018	14:30	USD	-	-
Fed's Bullard Speaks to Media	16-05-2018	21:30	USD	-	-

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