



17 Apr.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,540	0.1 %	3.2 %
BSE SENSEX	34,305	0.3 %	3.4 %
CNX BANK	25,360	0.2 %	4.2 %
CNX MIDCAP	19,911	0.4 %	4.3 %
CNX SMALLCAP	8,289	0.5 %	4.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,573	0.9 %	(1.0) %
S&P 500	2,678	0.8 %	(0.7) %
FTSE 100	7,198	(0.9) %	(5.9) %
HANG SENG	30,316	(1.6) %	(0.7) %
NIKKEI	21,836	0.3 %	(7.1) %
SHANGHAI COMPOSITE	3,111	(1.5) %	(7.1) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.49	0.4 %	2.9 %
EUR/USD	1.24	0.4 %	3.1 %
GBP/USD	1.43	0.7 %	6.1 %
USD/JPY	107.07	(0.3) %	(5.0) %
USD/AUD	1.29	(0.1) %	0.6 %
USD/SGD	1.31	(0.2) %	(1.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	0.5 %	11.6 %
Gold(INR/10g)	31,049	0.6 %	5.8 %
Gold Comex(USD/oz)	1,348	0.4 %	3.0 %
SILVER(INR/1Kg)	38,736	0.7 %	0.3 %
Aluminium(USD/MT)	2,325	4.7 %	3.1 %
Copper(USD/MT)	6,830	1.1 %	(4.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.4 %

**Global Economy:** The US Commerce Department released a report on Monday showing retail sales in the US increased by more than anticipated in the month of March. The report said retail sales climbed by 0.6% in March after edging down by 0.1% in February. The New York Fed said its general business conditions index fell to 15.8 in April from 22.5 in March. Likely reflecting winter weather effects, the National Association of Home Builders released a report on Monday unexpectedly showing a modest drop in US homebuilder confidence in the month of April. The report said the NAHB/Wells Fargo Housing Market Index edged down to 69 in April from 70 in March. Manufacturing employment in Germany increased in February, Destatis reported Monday. In local manufacturing units with 50 or more persons employed, employment totaled 5.6 million at the end of February. This represented an increase of about 147,000 or 2.7% from last February.

**Global Equities:** US stocks rose amid steady buying as traders looked beyond Syria worries and focused on economic data and corporate results.

**Indian Economy:** The India Meteorological Department (IMD) forecast a normal monsoon at 97% of long period average for the country on Monday. Considering the Indian Ocean variability, India is going to witness the third successive normal monsoon with a quantitative figure of 97% plus minus 5%. The onset of monsoon is expected in Kerala from the end of May or the first week of June, and will cover the country in the next 45 days.

**Equity Markets:** The Sensex and the Nifty logged modest gains on first trading day of the week. The Sensex and the Nifty advanced for the eight straight trading session. Market sentiment got a boost after India's annual WPI-based inflation eased to 2.47% in March, helped by a fall in food prices. The Sensex and the Nifty, both, attained their highest closing levels in almost seven weeks. A bout of volatility was seen in early trade as the key benchmark indices cut losses after a gap-down opening triggered by negative Asian stocks. The Sensex regained the psychological 34,000 level soon after an initial slide pulled it below that level in opening trade. Indices recovered sharply in afternoon trade after India's annual wholesale price inflation slightly eased in March.

**Corporate News:** Adani Ports and Special Economic Zone (APSEZ), India's leading port infrastructure developer and part of the Adani Group, said it signed a long term agreement with Indian Oil Corporation (IOC) to provide Liquefied Natural Gas (LNG) regasification services on a use or pay basis to the state-run refiner, at its upcoming LNG import terminal at Dhamra in Odisha. Housing Development Finance Corporation (HDFC) will be watched. HDFC Asset Management Company (HDFC AMC), a joint venture between HDFC and Standard Life Investments, reported a 31% jump in profit after tax at Rs 721.61 crore in the year ended March 2018 over the year ended March 2017. HDFC AMC last month filed a draft red herring prospectus with Sebi for a public offer of up to 2.54 crore shares. Bajaj Electricals announced that its engineering and project business unit bagged orders for ten rural/urban electrification projects in Uttar Pradesh aggregating worth Rs 3577.93 crore from Madhyanchal Vidyut Vitaran Nigam (MUVNL) under the Saubhagya Yojna of Government of India. The projects shall be completed within 15 months from the date of issue of LOI.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(12.9)	(18.1)	(18.1)
MF(INR cr)	(6.4)	345.9	345.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	30,582	32,464	32,464
F&O(INR cr)	516,838	694,931	694,931

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.4	20.5	20.5
NSE VIX	14.3	14.9	14.9

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,321	0.5 %	4.1 %	Energy	13,638	0.0 %	2.6 %
IT	13,203	(0.4) %	3.9 %	Pharma	8,867	1.6 %	2.9 %
Metals	3,732	0.2 %	5.4 %	Finance	10,659	0.8 %	3.9 %
Auto	11,505	0.3 %	4.0 %	PSU	2,918	(0.8) %	2.2 %
FMCG	27,267	1.1 %	2.9 %	Real Estate	306	1.6 %	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>
Cipla	585	5.3 %	1.5 %	Tata Motor	339	(5.0) %	0.0 %
Grasim Ind	1,092	2.7 %	0.3 %	Tata Motor	194	(4.5) %	2.2 %
Oracle Fin	4,137	2.6 %	5.0 %	Infosys	1,133	(3.3) %	(0.3) %
ACC	1,577	2.6 %	2.6 %	Shriram Tr	1,562	(2.8) %	6.4 %
UPL	764	2.2 %	1.5 %	Bharat Ele	139	(2.4) %	(3.9) %

### 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>					

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