



17 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,759	0.2 %	5.4 %
BSE SENSEX	35,388	(0.4) %	6.5 %
CNX BANK	26,278	0.4 %	8.0 %
CNX MIDCAP	19,151	0.4 %	0.3 %
CNX SMALLCAP	7,980	0.7 %	0.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,769	0.3 %	(0.2) %
S&P 500	2,722	0.4 %	1.0 %
FTSE 100	7,734	0.2 %	1.1 %
HANG SENG	31,110	(0.1) %	1.9 %
NIKKEI	22,717	(0.4) %	(3.4) %
SHANGHAI COMPOSITE	3,170	(0.7) %	(5.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.80	0.4 %	6.5 %
EUR/USD	1.18	(0.9) %	(1.5) %
GBP/USD	1.36	(0.0) %	0.3 %
USD/JPY	110.13	0.4 %	(2.3) %
USD/AUD	1.33	(0.2) %	3.6 %
USD/SGD	1.34	0.2 %	0.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	0.5 %	18.1 %
Gold(INR/10g)	30,954	(1.2) %	5.4 %
Gold Comex(USD/oz)	1,293	(1.6) %	(1.2) %
SILVER(INR/1Kg)	39,069	(1.4) %	1.2 %
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: Eurozone inflation eased to 1.2% in April from 1.3% in March, final data from Eurostat showed Wednesday. Inflation continues to stay below the European Central Bank's target of 'below, but close to 2 percent'. On a monthly basis, the harmonized index of consumer prices gained 0.3% in April. Core inflation that excludes food, alcohol and tobacco, slowed to 0.7% from 1% a month ago. China housing prices stayed largely stable in major Chinese cities in April as the government continued tough purchase restrictions. On a yearly basis, new residential housing prices in China's first-tier cities declined 0.4 percentage points more in April compared with a 0.6% drop in March, the National Bureau of Statistics (NBS) said.

Global Equities: European stocks managed to edge up but the overall mood remained weary as investors monitored surging interest rates in the bond markets.

Indian Economy: The 20 banks that have declared their earnings for the March quarter so far saw their collective non-performing assets rise to 8.32 percent of all the loans on their books, CARE Ratings said in a report. Of the 20 lenders, 11 belonged to the private sector, while 9 were state-owned. At the end of March last year, their collective NPAs constituted 7.17% of their loans. In absolute terms, NPAs increased 32.7% year on year to Rs 3.46 lakh crore at the end of March. In comparison, all their advances put together rose 14.4% over the same period.

Equity Markets: Local stocks recorded losses after a highly volatile session following the political uncertainty in Karnataka and subdued global stocks. Local stocks began trading for the day on a weak note as US and Asian shares declined amid rising geopolitical tensions in the Korean peninsula. Key benchmark indices extended early slide and hit fresh intraday low in morning trade. Stocks cut losses in mid-morning and early afternoon trade. Key benchmark indices once again extended losses in mid-afternoon and late trade on fresh selling.

Corporate News: JSW Steel, the largest steelmaker in India, reported nearly 3-fold increase in its Q4 net profit at Rs 2879 crore on YoY basis. The company had reported net profit at Rs 1008 crore in the quarter ended March 2017. Revenue of the company soared 16% to Rs 20817 crore against Rs 17917 crore. ITC said that its net profit rose 9.86% to Rs 2932.71 crore on 26.48% decline in total income to Rs 11329.74 crore in Q4 March 2018 over Q4 March 2017. Hindalco Industries stated that its net profit fell 24.98% to Rs 376.97 crore on 0.69% decline in total income to Rs 11866.02 crore in Q4 March 2018 over Q4 March 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(27.3)	(41.6)	(45.1)
MF(INR cr)	693.2	497.4	499.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,325	34,042	33,986
F&O(INR cr)	1,106,657	725,062	737,372

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.6	14.4	16.9
NSE VIX	13.4	13.7	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,182	(1.1) %	7.6 %	Energy	13,786	(1.7) %	3.7 %
IT	13,526	0.2 %	6.4 %	Pharma	8,399	(0.0) %	(2.6) %
Metals	3,696	(0.4) %	4.4 %	Finance	10,903	(1.0) %	6.3 %
Auto	11,165	(0.2) %	1.0 %	PSU	2,710	(3.0) %	(5.1) %
FMCG	28,866	1.8 %	8.9 %	Real Estate	307	2.1 %	3.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Hind. Unil	1,574	3.9 %	16.5 %	Punjab Nat	76	(12.0) %	(21.5) %
P & G Hygi	9,397	2.9 %	0.1 %	Bank of Ba	132	(5.4) %	(6.9) %
Colgate-Pa	1,178	2.3 %	11.4 %	ICICI Bank	297	(3.6) %	13.5 %
General In	690	2.2 %	(6.7) %	UltraTech	3,991	(2.9) %	0.3 %
Lupin	767	2.1 %	(1.4) %	Petronet L	203	(2.8) %	(12.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (MAY)	17-05-2018	1:00	AUD	-	0.036
Employment Change (APR)	17-05-2018	1:30	AUD	-	-
Full Time Employment Change (APR)	17-05-2018	1:30	AUD	-	-
Part Time Employment Change (APR)	17-05-2018	1:30	AUD	-	-
Participation Rate (APR)	17-05-2018	1:30	AUD	-	0.655
RBA Foreign Exchange Transaction (Australian dollar) (APR)	17-05-2018	1:30	AUD	-	-
RBA FX Transactions Government (APR)	17-05-2018	1:30	AUD	-	-
RBA FX Transactions Other (APR)	17-05-2018	1:30	AUD	-	-
Unemployment Rate (APR)	17-05-2018	1:30	AUD	-	0.055
ADP Publishes April Payrolls Report	17-05-2018	12:30	CAD	-	-
International Securities Transactions (Canadian dollar) (MAR)	17-05-2018	12:30	CAD	-	-
ECB Vice-President Constancio Speaks in Frankfurt	17-05-2018	10:30	EUR	-	-
ECB Vice President Constancio Speaks in Frankfurt	17-05-2018	12:00	EUR	-	-
EU 25 New Car Registrations (APR)	17-05-2018	6:00	EUR	-	(0.053)
Euro-Zone Construction Output s.a. (MoM) (MAR)	17-05-2018	9:00	EUR	-	(0.005)
Euro-Zone Construction Output w.d.a. (YoY) (MAR)	17-05-2018	9:00	EUR	-	0.004
BOE Chief Economist Haldane Speaks in London	17-05-2018	16:00	GBP	-	-
National Consumer Price Index (YoY) (APR)	17-05-2018	23:30	JPY	-	0.011
National Consumer Price Index Ex-Fresh Food (YoY) (APR)	17-05-2018	23:30	JPY	-	0.009
Natl CPI Ex Fresh Food, Energy (YoY) (APR)	17-05-2018	23:30	JPY	-	0.005
Continuing Claims (MAY 5)	17-05-2018	12:30	USD	-	-
Initial Jobless Claims (MAY 12)	17-05-2018	12:30	USD	-	-
Philadelphia Fed Business Outlook (MAY)	17-05-2018	12:30	USD	-	23.2
Leading Index (APR)	17-05-2018	14:00	USD	-	0.003
EIA Natural Gas Storage Change (MAY 11)	17-05-2018	14:30	USD	-	89
EIA Working Natural Gas Implied Flow (MAY 11)	17-05-2018	14:30	USD	-	89
Fed's Kashkari Speaks at Moderated Q&A in Minneapolis	17-05-2018	14:45	USD	-	-
U.S. to Sell USD11 Bln 10-Year TIPS Reopening	17-05-2018	17:00	USD	-	-
Fed's Kashkari Speaks at Moderated Q&A	17-05-2018	17:30	USD	-	-



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