



17 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,257	0.0 %	(3.5) %
BSE SENSEX	37,393	0.8 %	(3.8) %
CNX BANK	28,855	0.0 %	(4.9) %
CNX MIDCAP	16,673	0.0 %	(9.1) %
CNX SMALLCAP	6,104	0.0 %	(9.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,863	0.8 %	10.9 %
S&P 500	2,876	0.9 %	14.7 %
FTSE 100	7,354	0.8 %	9.2 %
HANG SENG	28,275	0.0 %	12.5 %
NIKKEI	21,063	(0.6) %	7.7 %
SHANGHAI COMPOSITE	2,956	0.6 %	19.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.28	(0.2) %	1.2 %
EUR/USD	1.12	(0.3) %	(2.2) %
GBP/USD	1.29	(0.9) %	1.1 %
USD/JPY	109.54	0.1 %	(0.1) %
USD/AUD	1.44	0.5 %	1.6 %
USD/SGD	1.37	0.0 %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	1.4 %	35.1 %
Gold(INR/10g)	32,051	(0.6) %	1.6 %
Gold Comex(USD/oz)	1,285	(0.9) %	(0.4) %
SILVER(INR/1Kg)	37,070	(0.6) %	(3.1) %
Aluminium(USD/MT)	1,832	1.7 %	(1.4) %
Copper(USD/MT)	6,089	1.4 %	4.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	0.0 %	(0.2) %

Global Economy: The Philly Fed said its diffusion index for current general activity surged up to 16.6 in May after falling to 8.5 in April, with a positive reading indicating growth in regional manufacturing activity. The spurt by the headline index was partly due to a significant increase by the shipments index, which spiked to 27.6 in May from 18.4 in April. The US Commerce Department said housing starts soared by 5.7% to an annual rate of 1.235 million in April after climbing by 1.7% to a revised rate of 1.168 million in March. The building permits also rose by 0.6% to a rate of 1.296 million in April after edging down by 0.2% to a revised rate of 1.288 million in March. The US initial jobless claims slid to 212,000, a decrease of 16,000 from the previous week's unrevised level of 228,000. The euro area trade surplus declined in March on higher imports, figures from Eurostat showed Thursday. The trade surplus fell to a seasonally adjusted EUR 17.9 billion from EUR 20.6 billion in February.

Global Equities: The US stocks witnessed a significant surge on supportive economic cues. DOW extended gains from near three month low.

Indian Economy: The Reserve Bank of India has asked non-banking finance companies (NBFCs) with asset size of more than Rs 5,000 crore to appoint a chief risk officer (CRO) with clearly specified role and responsibilities. The water storage available in 91 major reservoirs of the country for the week ending on May 16, 2019 was 35.99 BCM, which is 22% of total storage capacity of these reservoirs. This percentage was at 24 for the week ending on May 09, 2019. The level of water storage in the week ending on May 16, 2019 was 115% of the storage of corresponding period of last year and 105% of storage of average of last ten years.

Equity Markets: Domestic stocks ended with modest gains, supported by firmness in index pivots. Gains were boosted by index heavyweights Infosys, ICICI Bank and HDFC Bank. The barometer index, the S&P BSE Sensex, rose 278.60 points or 0.75% to 37,393.48. The Nifty 50 index rose 100.10 points or 0.90% to 11,257.10.

Corporate News: Bajaj Finserv recorded a 32% rise in consolidated net profit at Rs 839 crore for the March quarter of financial year 2018-19. Total revenue grew by 44% to Rs 12,995 crore in the fourth quarter of last fiscal. Auto component maker Minda Industries reported a 46% decline in consolidated profit at Rs 74 crore for the fourth quarter ended March 2019. Total sales rose 8% to Rs 1,486 crore during the quarter under review as compared to Rs 1,371 crore in the March quarter of FY18. Punjab National Bank said it has terminated the agreements with General Atlantic Group and Varde Partners to sell its stake in PNB Housing Finance.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(149.2)	(41.5)	86.5
MF(INR cr)	302.0	656.2	67.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,512	27,655	32,311
F&O(INR cr)	1,986,219	1,245,520	1,208,533

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.3	17.0	14.4
NSE VIX	28.4	26.3	23.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,855	0.8 %	(4.9) %	Energy	15,531	1.7 %	(6.1) %
IT	15,934	1.0 %	0.6 %	Pharma	8,577	(0.2) %	(8.5) %
Metals	2,811	1.2 %	(9.4) %	Finance	12,326	1.0 %	(1.4) %
Auto	7,892	0.4 %	(6.2) %	PSU	2,912	0.4 %	(14.0) %
FMCG	29,229	0.1 %	(3.2) %	Real Estate	252	1.1 %	(5.7) %

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>
Zee Entert	346	7.2 %	(19.9) %	Interglobe	1,465	(9.0) %	3.4 %
Siemens	1,130	5.2 %	(0.2) %	Vodafone I	12	(5.4) %	(31.3) %
H P C L	281	5.1 %	(1.0) %	Piramal En	2,047	(4.3) %	(24.0) %
B P C L	376	4.5 %	(4.2) %	Petronet L	224	(3.9) %	(9.4) %
UltraTech	4,513	3.9 %	11.3 %	Yes Bank	138	(3.6) %	(50.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
EU 25 New Car Registrations (APR)	17-05-2019	6:00	EUR	-	(0.039)
Euro-Zone Construction Output s.a. (MoM) (MAR)	17-05-2019	9:00	EUR	-	0.03
Euro-Zone Construction Output w.d.a. (YoY) (MAR)	17-05-2019	9:00	EUR	-	0.052
Euro-Zone Consumer Price Index (MoM) (APR)	17-05-2019	9:00	EUR	-	0.01
Euro-Zone Consumer Price Index (YoY) (APR F)	17-05-2019	9:00	EUR	-	0.014
Euro-Zone Consumer Price Index Core (YoY) (APR F)	17-05-2019	9:00	EUR	-	0.012
BOE's Alex Brazier speaks in London	17-05-2019	12:00	GBP	-	-
BOJ Outright Bond Purchase 10~25 Years	17-05-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	17-05-2019	1:10	JPY	-	-
Tertiary Industry Index (MoM) (MAR)	17-05-2019	4:30	JPY	-	(0.006)
Leading Index (APR)	17-05-2019	14:00	USD	-	0.004
U. of Mich. 1 Yr Inflation (MAY P)	17-05-2019	14:00	USD	-	0.025
U. of Mich. 5-10 Yr Inflation (MAY P)	17-05-2019	14:00	USD	-	0.023
U. of Mich. Current Conditions (MAY P)	17-05-2019	14:00	USD	-	112.3
U. of Mich. Expectations (MAY P)	17-05-2019	14:00	USD	-	87.4
U. of Mich. Sentiment (MAY P)	17-05-2019	14:00	USD	-	97.2
Fed's Williams Meets With Community Leaders	17-05-2019	15:15	USD	-	-
Baker Hughes U.S. Rig Count (MAY 17)	17-05-2019	17:00	USD	-	988
Clarida Speaks at 'Fed Listens' Event in Philadelphia	17-05-2019	17:40	USD	-	-

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