



18 May.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,471	(0.6) %	2.5 %
BSE SENSEX	30,659	0.2 %	2.2 %
CNX BANK	22,776	(0.7) %	5.7 %
CNX MIDCAP	18,252	(1.1) %	5.3 %
CNX SMALLCAP	7,574	(0.8) %	7.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,607	(1.8) %	3.6 %
S&P 500	2,357	(1.8) %	4.4 %
FTSE 100	7,503	(0.3) %	4.5 %
HANG SENG	25,294	(0.2) %	14.2 %
NIKKEI	19,554	(1.3) %	(0.2) %
SHANGHAI COMPOSITE	3,104	(0.3) %	(1.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.16	0.1 %	(4.8) %
EUR/USD	1.12	0.5 %	5.2 %
GBP/USD	1.30	0.3 %	5.4 %
USD/JPY	111.09	(1.4) %	(4.2) %
USD/AUD	1.34	(0.5) %	(1.9) %
USD/SGD	1.39	(0.3) %	(2.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	0.8 %	(6.2) %
Gold(INR/10g)	28,294	0.9 %	1.7 %
Gold Comex(USD/oz)	1,261	1.4 %	9.0 %
SILVER(INR/1Kg)	38,854	1.1 %	(0.2) %
Aluminium(USD/MT)	1,928	0.7 %	13.3 %
Copper(USD/MT)	5,575	(0.2) %	0.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	(0.1) %	(0.2) %

Global Economy: Eurozone inflation accelerated as estimated in April, final data from Eurostat showed Wednesday. Headline inflation climbed to 1.9% from 1.5% in March. Inflation has returned to the the European Central Bank's target of 'below, but close to 2 percent.' Core inflation that excludes energy, food, alcohol & tobacco also surged to 1.2% from 0.7% in March. The latest level was the highest since September 2013. Both headline and core inflation figures matched flash estimate published on April 28. On a monthly basis, overall consumer prices climbed 0.4% in April. Core machine orders in Japan rose by a seasonally adjusted 1.4% on month in March, the Cabinet Office said on Wednesday - coming in at 862.3 billion yen. On a yearly basis, core machine orders fell 0.7%, following the 5.6% surge in the previous month.

Global Equities: Broad global geopolitical concerns weighed on US stocks and the DOW dropped nearly 400 points. With the steep drop on the day, the tech-heavy Nasdaq pulled back well off its record closing high.

Indian Economy: The Medium and Heavy Commercial Vehicle (MHCV) segment posted a 55% yoy and 73% mom decline in domestic sales volumes in April 2017, which is disconcerting and reflective of the possible MHCV industry downturn, says India Ratings and Research (Ind-Ra). MHCV sales volumes traditionally have displayed a sharp month on month decline in the month of April, due to highest annual sales usually registered in the month of March. The year on year percent volume change however for April has not displayed such high volatility. In fact the last two years witnessed high year on year volume growth in April, following the decline for the previous three years.

Equity Markets: Key benchmark indices logged modest gains and hit fresh record highs as buying momentum continued unabated amid bright prospects of monsoon rains and expectations of further reforms by the government. Both the Sensex and the Nifty hit record high levels on intraday as well as on closing basis.

Corporate News: Hindustan Unilever's net profit rose 6.19% to Rs 1183 crore on 6.39% rise in total income to Rs 8969 crore in Q4 March 2017 over Q4 March 2016. Hindustan Unilever recommended a final dividend of Rs 10 per share for the financial year ended March 2017. Axis Bank announced that it has decided to keep the Marginal Cost of Funds based Lending Rate (MCLR) of the unchanged. This will be effective from 18 May 2017. The bank's MCLR for overnight loans will be 7.9%, the rate for one month will be 7.9% and for three months it will be 8.05%. The MCLR on 6-month loans will be 8.15% and for one-year loans the rate will be 8.25%, the bank said. MCLR on two-year loans will be 8.3% and for three-year loans the rate will be 8.35%. JSW Steel's consolidated net profit jumped 235% to Rs 1009 crore on 53% rise in revenue from operations to Rs 17917 crore in Q4 March 2017 over Q4 March 2016. The company in its guidance said that crude steel production is estimated to rise 4.4% to 16.5 million tonnes in year ending 31 March 2018 (FY 2018) over FY 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	163.0	58.2	8.5
MF(INR cr)	230.2	259.1	494.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,572	29,337	29,974
F&O(INR cr)	442,262	445,338	493,458

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.6	10.8	12.2
NSE VIX	10.6	11.1	11.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	22,936	0.0 %	6.4 %	Energy	12,073	(0.2) %	2.1 %
IT	10,437	(0.2) %	(1.5) %	Pharma	10,223	(0.2) %	(2.7) %
Metals	3,031	2.2 %	(2.4) %	Finance	9,344	(0.0) %	5.9 %
Auto	10,670	0.7 %	7.5 %	PSU	3,818	(0.6) %	8.3 %
FMCG	24,267	(0.4) %	2.7 %	Real Estate	274	(0.2) %	24.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Steel	494	8.2 %	1.7 %	Shree Ceme	18,870	(5.4) %	9.9 %
Bharti Inf	390	3.5 %	18.3 %	Punjab Nat	165	(5.2) %	10.1 %
Indiabulls	1,082	2.7 %	8.6 %	P & G Hygi	7,669	(4.7) %	3.8 %
Tata Motor	449	2.7 %	(4.5) %	Cummins In	1,016	(3.0) %	5.7 %
JSW Steel	207	2.5 %	9.4 %	Tech Mahin	431	(2.9) %	(4.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (MAY)	18-05-2017	1:00	AUD	-	0.041
Employment Change (APR)	18-05-2017	1:30	AUD	-	-
Full Time Employment Change (APR)	18-05-2017	1:30	AUD	-	-
Part Time Employment Change (APR)	18-05-2017	1:30	AUD	-	-
Participation Rate (APR)	18-05-2017	1:30	AUD	-	0.648
RBA Foreign Exchange Transaction (Australian dollar) (APR)	18-05-2017	1:30	AUD	-	-
RBA FX Transactions Government (APR)	18-05-2017	1:30	AUD	-	-
RBA FX Transactions Other (APR)	18-05-2017	1:30	AUD	-	-
Unemployment Rate (APR)	18-05-2017	1:30	AUD	-	0.059
International Securities Transactions (Canadian dollar) (MAR)	18-05-2017	12:30	CAD	-	-
China April Property Prices	18-05-2017	1:30	CNY	-	-
ECB Executive Board member Mersch speaks in Frankfurt	18-05-2017	7:50	EUR	-	-
ECB Executive Board member Mersch speaks in Luxembourg	18-05-2017	12:30	EUR	-	-
ECB's Draghi Speaks in Tel Aviv	18-05-2017	17:00	EUR	-	-
ECB's Lautenschlaeger Speaks in Berlin	18-05-2017	12:45	EUR	-	-
Retail Sales (MoM) (APR)	18-05-2017	8:30	GBP	-	(0.015)
Retail Sales (YoY) (APR)	18-05-2017	8:30	GBP	-	0.026
Retail Sales Inc Auto Fuel (MoM) (APR)	18-05-2017	8:30	GBP	-	(0.018)
Retail Sales Inc Auto Fuel (YoY) (APR)	18-05-2017	8:30	GBP	-	0.017
Tokyo Condominium Sales (YoY) (APR)	18-05-2017	4:00	JPY	-	0.266
ANZ Consumer Confidence (MoM) (MAY)	18-05-2017	1:00	NZD	-	(0.028)
ANZ Consumer Confidence Index (MAY)	18-05-2017	1:00	NZD	-	121.7
Net Migration SA (APR)	18-05-2017	22:45	NZD	-	6100
Continuing Claims (MAY 06)	18-05-2017	12:30	USD	-	-
EIA Natural Gas Storage Change (MAY 12)	18-05-2017	14:30	USD	-	45
EIA Working Natural Gas Implied Flow (MAY 12)	18-05-2017	14:30	USD	-	45
Fed's Bullard Speech With Kristin Forbes -- Cancelled	18-05-2017	4:00	USD	-	-
Fed's Mester Speaks on Economy and Monetary Policy	18-05-2017	17:15	USD	-	-
Initial Unemployment Claims (MAY 12)	18-05-2017	12:30	USD	-	-



Leading Indicators (APR)	18-05-2017	14:00	USD	-	0.004
Philadelphia Fed. (MAY)	18-05-2017	12:30	USD	-	22
U.S. to Sell USD11 Bln 10-Year TIPS Reopening	18-05-2017	17:00	USD	-	-

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