



18 May.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,637	(0.4) %	4.2 %
BSE SENSEX	35,149	(0.7) %	5.3 %
CNX BANK	25,931	(0.5) %	6.6 %
CNX MIDCAP	19,029	(0.6) %	(0.4) %
CNX SMALLCAP	7,982	(0.2) %	0.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,714	(0.2) %	(0.4) %
S&P 500	2,720	(0.1) %	0.9 %
FTSE 100	7,788	0.7 %	1.8 %
HANG SENG	30,942	(0.5) %	1.4 %
NIKKEI	22,838	0.5 %	(2.8) %
SHANGHAI COMPOSITE	3,154	(0.5) %	(5.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	67.70	(0.1) %	6.3 %
EUR/USD	1.18	(0.2) %	(1.7) %
GBP/USD	1.35	(0.3) %	0.0 %
USD/JPY	110.95	0.7 %	(1.6) %
USD/AUD	1.33	0.4 %	4.1 %
USD/SGD	1.34	0.3 %	0.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	0.0 %	18.4 %
Gold(INR/10g)	30,826	(0.4) %	5.0 %
Gold Comex(USD/oz)	1,288	(0.3) %	(1.6) %
SILVER(INR/1Kg)	39,427	0.9 %	2.1 %
Aluminium(USD/MT)	2,280	(1.7) %	1.1 %
Copper(USD/MT)	6,838	1.0 %	(4.8) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.0 %	0.7 %

**Global Economy:** Indicating solid economic growth in the second half of the year, the Conference Board released a report on Thursday showing a continued uptrend by its index of leading US economic indicators in the month of April. The Conference Board said its leading economic index rose by 0.4%. Growth in Philadelphia-area manufacturing activity unexpectedly witnessed a substantial acceleration in the month of May. The Philly Fed said its diffusion index for current general activity surged up to 34.4 in May from 23.2 in April. The US initial jobless claims rose to 222,000, an increase of 11,000 from the previous week's unrevised level of 211,000.

**Global Equities:** US stocks witnessed mixed moves. Sentiments remained choppy as traders expressed some uncertainty about the second round of trade talks between the US and China.

**Indian Economy:** The permissible limits on borrowings under Fiscal Consolidation roadmap needed to be equally applicable to Centre and States in the context of overall macroeconomic framework, agreed the leading economists in a meeting with Fifteenth Finance Commission. Economists further agreed that it would be realistic to use contemporary population data but weightage should be assigned to population and also rewards for population stabilization policy. It could be appropriately determined by the commission. Commission needs to balance equity with efficiency.

**Equity Markets:** The local markets declined as investors were concerned about political uncertainty in Karnataka. The barometer index, the S&P BSE Sensex, fell 238.76 points or 0.67% to settle at 35,149.12. The Nifty 50 index fell 58.40 points or 0.54% to settle at 10,682.70. Brent Crude oil prices inching closer to \$80 per barrel, continued foreign fund outflows and mixed cues from other Asian markets also hurt sentiment.

**Corporate News:** Sun Pharmaceutical Industries announced that one of its wholly-owned subsidiaries has launched in US, the Authorized Generic (AG) version for Daiichi Sankyo Inc.'s Welchol (colesevelam hydrochloride) 625mg tablets. The launch is pursuant to a distribution and supply agreement between Sun Pharma's wholly owned subsidiary and Daiichi Sankyo Inc., which grants the Sun Pharma subsidiary, exclusive rights to distribute these tablets in the US for a pre-determined period. Godrej Agrovet announced that its subsidiary, Creamline Dairy Products (CDPL), as a part of its expansion plans, intends to invest Rs 400 crore in 3 greenfield milk processing plants in Tamil Nadu, North Karnataka and Maharashtra over the period of next 3 years. CDPL had recently acquired a processing plant in Tirunelveli, Tamil Nadu and is in the process of setting up another plant in Visakhapatnam. The objectives behind this proposed expansion includes growing the share of value-added milk products. Vijaya Bank announced that a board meeting will be held on 20 May 2018 to discuss on the capital raising plan under BASEL-III for the financial year 2018-2019.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(106.2)	(47.5)	(47.0)
MF(INR cr)	693.2	497.4	499.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,293	34,063	33,995
F&O(INR cr)	1,432,763	784,037	758,445

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	14.3	16.7
NSE VIX	13.4	13.7	13.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,074	(0.4) %	7.2 %	Energy	13,683	(0.7) %	2.9 %
IT	13,505	(0.2) %	6.3 %	Pharma	8,403	0.0 %	(2.5) %
Metals	3,679	(0.5) %	3.9 %	Finance	10,876	(0.3) %	6.0 %
Auto	11,155	(0.1) %	0.9 %	PSU	2,707	(0.1) %	(5.2) %
FMCG	28,496	(1.3) %	7.5 %	Real Estate	307	0.1 %	3.7 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Petronet L	219	7.6 %	(5.3) %	Hindalco I	233	(2.8) %	10.3 %
Bajaj Fin.	2,067	7.6 %	13.6 %	UPL	707	(2.6) %	(6.0) %
Bajaj Fins	5,569	4.7 %	5.7 %	ITC	279	(2.4) %	8.0 %
General In	716	3.7 %	(3.2) %	Bharti Air	368	(2.1) %	(7.0) %
S A I L	77	3.7 %	4.8 %	H D F C	1,875	(2.1) %	2.0 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (APR)	18-05-2018	12:30	CAD	-	132.9
Consumer Price Index (YoY) (APR)	18-05-2018	12:30	CAD	-	0.023
Consumer Price Index Core (YoY) (APR)	18-05-2018	12:30	CAD	-	0.019
Consumer Price Index Core- Median (YoY) (APR)	18-05-2018	12:30	CAD	-	0.021
Consumer Price Index Core- Trim (YoY) (APR)	18-05-2018	12:30	CAD	-	0.02
Consumer Price Index n.s.a. (MoM) (APR)	18-05-2018	12:30	CAD	-	0.003
Retail Sales (MoM) (MAR)	18-05-2018	12:30	CAD	-	0.004
Retail Sales Ex Auto (MoM) (MAR)	18-05-2018	12:30	CAD	-	0
German Producer Price Index (MoM) (APR)	18-05-2018	6:00	EUR	-	0.001
German Producer Price Index (YoY) (APR)	18-05-2018	6:00	EUR	-	0.019
German Wholesale Price Index (MoM) (APR)	18-05-2018	6:00	EUR	-	0
German Wholesale Price Index (YoY) (APR)	18-05-2018	6:00	EUR	-	0.012
Euro-Zone Current Account n.s.a. (euros) (MAR)	18-05-2018	8:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (MAR)	18-05-2018	8:00	EUR	-	-
Euro-Zone Trade Balance (euros) (MAR)	18-05-2018	9:00	EUR	-	-
Euro-Zone Trade Balance s.a. (MAR)	18-05-2018	9:00	EUR	-	-
BOJ Outright Bond Purchase 1~3 Years	18-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	18-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	18-05-2018	1:10	JPY	-	-
Fed's Brainard Speaks About Community Reinvestment Act	18-05-2018	13:15	USD	-	-
Fed's Kaplan Speaks in Moderated Q&A	18-05-2018	13:15	USD	-	-
Baker Hughes U.S. Rig Count (MAY 18)	18-05-2018	17:00	USD	-	1045
Fed's Mester Speaks at ECB on Macroprudential, Monetary Policy	18-05-2018	7:00	USD	-	-

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