



19 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,561	0.3 %	3.4 %
BSE SENSEX	34,332	(0.2) %	3.5 %
CNX BANK	25,131	0.1 %	3.3 %
CNX MIDCAP	19,908	0.3 %	4.2 %
CNX SMALLCAP	8,273	0.4 %	4.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,748	(0.2) %	(0.3) %
S&P 500	2,709	0.1 %	0.5 %
FTSE 100	7,317	1.3 %	(4.3) %
HANG SENG	30,284	0.7 %	(0.8) %
NIKKEI	22,158	1.4 %	(5.7) %
SHANGHAI COMPOSITE	3,091	0.8 %	(7.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.66	0.0 %	3.1 %
EUR/USD	1.24	(0.0) %	3.0 %
GBP/USD	1.42	(0.8) %	5.0 %
USD/JPY	107.47	0.2 %	(4.7) %
USD/AUD	1.29	(0.0) %	0.6 %
USD/SGD	1.31	(0.1) %	(1.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	2.9 %	13.4 %
Gold(INR/10g)	31,276	0.6 %	6.5 %
Gold Comex(USD/oz)	1,355	0.6 %	3.6 %
SILVER(INR/1Kg)	39,496	1.6 %	2.3 %
Aluminium(USD/MT)	2,529	6.4 %	12.1 %
Copper(USD/MT)	6,936	2.2 %	(3.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

Global Economy: Eurozone inflation accelerated in March albeit at a slower than initially estimated pace, final data from Eurostat showed Wednesday. Inflation rose to 1.3% in March from 1.1% in February. The rate was revised down from 1.4% estimated on April 4. Inflation continues to stay below the European Central Bank's target of 'below, but close to 2%. However, core inflation that excludes the volatile prices of energy, food, alcohol and tobacco, held steady at 1%, as initially estimated. Europe's passenger car sales dropped in March, witnessing the first March drop since 2014, the European Automobile Manufacturers Association reported Wednesday. Car sales slipped 5.3% year-on-year to 1.79 million units in March. However, the agency noted that last year's sales figure was biggest on record for March constituting a high basis of comparison. Sales had increased 4.3% in February and 7.1% in January. UK inflation slowed to a one year-low in March. Consumer prices climbed 2.5% year-on-year in March, slower than the 2.7% increase posted in February. Japan's exports edged up in March, on strong demand for cars and equipment to make semiconductors, data from Japan's finance ministry showed. Exports rose 2.1% from a year ago, on a rebound in demand after a lull last month. The increase helped Japan log a 10.8% rise in exports for the business year ended March, the first annual rise in three years.

Global Equities: Rising metal and crude oil prices supported risky assets. A relative calm on geopolitical front also helped sentiments.

Indian Economy: To involve the districts more actively in the growth of the Indian economy and to formulate a common development vision starting from the district level, through a participatory mechanism, it has been decided by Union Commerce & Industry Minister Suresh Prabhu that District Plan will be created for achieving this goal. Suresh Prabhu emphasised the need to accelerate growth in the districts to ensure growth at the national level. There is need to create resource based plans, for the districts based on a bottom-up approach and implement the plan by going beyond a silo-ed mind-set. An addition of 3% growth at the district level will ensure that USD 5 trillion target for the Indian economy becomes achievable.

Equity Markets: Domestic shares corrected after recent sport. Stocks slipped after rising for nine consecutive sessions. FMCG stocks were in demand as forecasts of normal monsoon brightened their outlook. Bank shares declined. Asian stocks rose as an encouraging US earnings season underscored resilient growth. Profit selling hit local stocks in closing hours.

Corporate News: India's largest car maker Maruti Suzuki India Limited attained leadership position in utility vehicles sales in the domestic market in 2017-18, with over 27.5% market share. Global steel demand will grow 1.8% this year and 0.7% next year, driven by favourable world economic momentum, though the market faces risks from rising trade tensions, the World Steel Association (worldsteel) said on Tuesday. The association had previously forecast growth of 1.6% this year. The country's largest two-wheeler maker Hero MotoCorp launched an e-commerce portal www.hgpmart.com to retail Hero Genuine Parts and Accessories. Ashok Leyland has chalked out Rs 1000 crore CAPEX plan for 2018-19 which include setting up of a factory in Andhra Pradesh.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(173.7)	(34.0)	(34.0)
MF(INR cr)	598.9	287.2	287.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	3,081	30,147	30,147
F&O(INR cr)	791,942	694,126	694,126

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.6	19.3	19.3
NSE VIX	14.1	14.7	14.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,102	(0.9) %	3.2 %	Energy	13,696	(0.4) %	3.0 %
IT	13,124	(0.3) %	3.3 %	Pharma	8,790	(0.4) %	2.0 %
Metals	3,751	0.4 %	6.0 %	Finance	10,605	(0.7) %	3.3 %
Auto	11,412	(0.5) %	3.2 %	PSU	2,868	(1.1) %	0.5 %
FMCG	28,017	1.7 %	5.7 %	Real Estate	311	0.6 %	5.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Godrej Con	1,131	5.1 %	1.4 %	Bank of Ba	142	(4.2) %	(0.2) %
Dabur Indi	356	3.5 %	5.9 %	H P C L	320	(3.2) %	(7.2) %
ITC	275	2.9 %	6.6 %	Axis Bank	518	(2.7) %	3.8 %
Wipro	293	2.8 %	1.0 %	Titan Comp	977	(2.1) %	3.5 %
Sun TV Net	900	2.3 %	4.6 %	DLF	213	(2.0) %	5.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (MAR)	19-04-2018	1:30	AUD	-	-
Full Time Employment Change (MAR)	19-04-2018	1:30	AUD	-	-
NAB Business Confidence (1Q)	19-04-2018	1:30	AUD	-	6
Part Time Employment Change (MAR)	19-04-2018	1:30	AUD	-	-
Participation Rate (MAR)	19-04-2018	1:30	AUD	-	0.657
RBA Foreign Exchange Transaction (Australian dollar) (MAR)	19-04-2018	1:30	AUD	-	-
RBA FX Transactions Government (MAR)	19-04-2018	1:30	AUD	-	-
RBA FX Transactions Other (MAR)	19-04-2018	1:30	AUD	-	-
Unemployment Rate (MAR)	19-04-2018	1:30	AUD	-	0.056
ADP Publishes March Payrolls Report	19-04-2018	12:30	CAD	-	-
Euro-Zone Current Account n.s.a. (euros) (FEB)	19-04-2018	8:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (FEB)	19-04-2018	8:00	EUR	-	-
BOE FPC's Brazier speaks in London	19-04-2018	10:10	GBP	-	-
BOE's Cunliffe speaks in Washington.	19-04-2018	16:30	GBP	-	-
Retail Sales Ex Auto Fuel (MoM) (MAR)	19-04-2018	8:30	GBP	-	0.006
Retail Sales Ex Auto Fuel (YoY) (MAR)	19-04-2018	8:30	GBP	-	0.011
Retail Sales Inc Auto Fuel (MoM) (MAR)	19-04-2018	8:30	GBP	-	0.008
Retail Sales Inc Auto Fuel (YoY) (MAR)	19-04-2018	8:30	GBP	-	0.015
National Consumer Price Index (YoY) (MAR)	19-04-2018	23:30	JPY	-	0.015
National Consumer Price Index Ex-Fresh Food (YoY) (MAR)	19-04-2018	23:30	JPY	-	0.01
Natl Consumer Price Index Ex Fresh Food, Energy (YoY) (MAR)	19-04-2018	23:30	JPY	-	0.005
Continuing Claims (APR 7)	19-04-2018	12:30	USD	-	-
EIA Natural Gas Storage Change (APR 13)	19-04-2018	14:30	USD	-	(19)
EIA Working Natural Gas Implied Flow (APR 13)	19-04-2018	14:30	USD	-	(19)
Fed's Brainard Speaks on Regulatory Reform	19-04-2018	12:00	USD	-	-
Fed's Mester Speaks on Economic Outlook and Policy	19-04-2018	22:45	USD	-	-
Fed's Quarles Testifies on Supervision Before Senate Panel	19-04-2018	13:30	USD	-	-
Initial Jobless Claims (APR 14)	19-04-2018	12:30	USD	-	-
Leading Indicators (MAR)	19-04-2018	14:00	USD	-	0.006



Philadelphia Fed Business Outlook (APR)	19-04-2018	12:30	USD	-	22.3
U.S. to Sell USD 16Bln 5-Year TIPS Reopening	19-04-2018	17:00	USD	-	-

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