



20 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,560	(0.0) %	3.4 %
BSE SENSEX	34,427	0.3 %	3.5 %
CNX BANK	25,127	0.0 %	3.3 %
CNX MIDCAP	19,933	(0.2) %	4.4 %
CNX SMALLCAP	8,310	(0.1) %	4.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,665	(0.3) %	(0.6) %
S&P 500	2,693	(0.6) %	(0.1) %
FTSE 100	7,329	0.2 %	(4.2) %
HANG SENG	30,708	1.4 %	0.6 %
NIKKEI	22,191	0.2 %	(5.6) %
SHANGHAI COMPOSITE	3,117	0.8 %	(6.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.80	0.2 %	3.3 %
EUR/USD	1.23	(0.3) %	2.8 %
GBP/USD	1.41	(1.6) %	4.2 %
USD/JPY	107.65	0.4 %	(4.5) %
USD/AUD	1.30	0.7 %	1.4 %
USD/SGD	1.31	0.1 %	(1.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	2.9 %	13.4 %
Gold(INR/10g)	31,305	0.1 %	6.6 %
Gold Comex(USD/oz)	1,355	0.6 %	3.6 %
SILVER(INR/1Kg)	40,104	1.5 %	3.9 %
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: The International Monetary Fund, in the Global Financial Stability Report, said the short-term financial stability risks have increased somewhat against the backdrop of slightly tighter financial conditions. The medium-term risks are still elevated as financial vulnerabilities, which have built up during the years of accommodative policies, could mean a bumpy road ahead and put growth at risk, the fund added. Although emerging markets have generally improved fundamentals, it could be vulnerable to sudden tightening of global financial conditions. UK retail sales, including auto fuel, dropped 1.2% month-on-month in March, in contrast to a 0.8% rise in February, the Office for National Statistics showed. Similarly, excluding auto fuel, retail sales volume dropped 0.5%, reversing a 0.4% rise in February. On a yearly basis, overall retail sales volume growth eased to 1.1% in March from 1.5% a month ago.

Global Equities: Most European shares rose as soaring oil prices triggered a broader rally across commodities.

Indian Economy: India Ratings and Research (Ind-Ra) expects the automobile export volume growth momentum to continue in FY19, although at a slower pace than in FY18. Automobile exports from India revived in FY18, after showing subdued growth for two years due to weak economies and currencies in African and Latin America (LATAM) countries. With the stabilisation of commodity prices and exchange rates, these regions have witnessed economic stability, inducing demand for two wheelers (2W) in particular. Ind-Ra expects high single-digit growth in overall exports volume in FY19.

Equity Markets: Local indices settled higher on positive global cues in last session. Metal and mining stocks were in demand. The Sensex and the Nifty, both, settled at their highest closing levels in more than seven weeks. However, the focus is likely to shift towards earnings now and buying could get slim after recent spurt in major indices.

Corporate News: IndusInd Bank said its net profit rose 26.81% to Rs 953.09 crore on 16.21% rise in total income to Rs 5858.62 crore in Q4 March 2018 over Q4 March 2017. IndusInd Bank's gross non-performing assets (NPAs) stood at Rs 1704.91 crore as on 31 March 2018 as against Rs 1498.70 crore as on 31 December 2017 and Rs 1054.87 crore as on 31 March 2017. The ratio of gross NPAs to gross advances stood at 1.17% as on 31 March 2018 as against 1.16% as on 31 December 2017 and 0.93% as on 31 March 2017. Info Edge (India) has invested through its wholly-owned subsidiary about Rs. 3 crore in Bizcrum Infotech (ShoeKonnnect) as part of the company's strategic investments. Reliance Industries and BP announced the sanctioning of the 'Satellite cluster' project in Block KG D6. The 'Satellite cluster' is the second of three projects in the Block KG D6 integrated development. The first of the projects, development of the 'R-Series' deep-water gas fields, was sanctioned in June 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(133.6)	(41.6)	(41.6)
MF(INR cr)	323.7	290.5	290.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,163	30,434	30,434
F&O(INR cr)	1,215,965	731,401	731,401

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.6	19.3	19.3
NSE VIX	13.8	14.7	14.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,126	0.1 %	3.3 %	Energy	13,644	(0.4) %	2.7 %
IT	13,273	1.1 %	4.5 %	Pharma	8,830	0.5 %	2.4 %
Metals	3,920	4.5 %	10.8 %	Finance	10,580	(0.2) %	3.1 %
Auto	11,432	0.2 %	3.4 %	PSU	2,871	0.1 %	0.6 %
FMCG	28,173	0.6 %	6.3 %	Real Estate	313	0.6 %	5.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Hindalco I	265	9.0 %	25.3 %	B P C L	377	(7.1) %	(11.1) %
Vedanta	312	7.1 %	10.4 %	H P C L	302	(5.7) %	(12.5) %
S A I L	81	4.5 %	10.6 %	I O C L	158	(4.2) %	(7.3) %
JSW Steel	323	4.2 %	8.9 %	Titan Comp	953	(2.5) %	0.9 %
Tata Steel	622	3.4 %	7.5 %	Bharat Ele	136	(1.8) %	(5.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (MAR)	20-04-2018	12:30	CAD	-	132.5
Consumer Price Index (YoY) (MAR)	20-04-2018	12:30	CAD	-	0.022
Consumer Price Index Core (YoY) (MAR)	20-04-2018	12:30	CAD	-	0.019
Consumer Price Index Core- Median (YoY) (MAR)	20-04-2018	12:30	CAD	-	0.021
Consumer Price Index Core- Trim (YoY) (MAR)	20-04-2018	12:30	CAD	-	0.021
Consumer Price Index n.s.a. (MoM) (MAR)	20-04-2018	12:30	CAD	-	0.006
Retail Sales (MoM) (FEB)	20-04-2018	12:30	CAD	-	0.003
Retail Sales Ex Auto (MoM) (FEB)	20-04-2018	12:30	CAD	-	0.009
Euro-Zone Consumer Confidence (APR A)	20-04-2018	14:00	EUR	-	0.1
German Producer Price Index (MoM) (MAR)	20-04-2018	6:00	EUR	-	(0.001)
German Producer Price Index (YoY) (MAR)	20-04-2018	6:00	EUR	-	0.018
BOE's Saunders speaks in Glasgow.	20-04-2018	9:30	GBP	-	-
BOJ Outright Bond Purchase 10~25 Years	20-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	20-04-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	20-04-2018	1:10	JPY	-	-
Convenience Store Sales (YoY) (MAR)	20-04-2018	7:00	JPY	-	0.003
Nationwide Department Store Sales (YoY) (MAR)	20-04-2018	5:30	JPY	-	(0.009)
Tertiary Industry Index (MoM) (FEB)	20-04-2018	4:30	JPY	-	(0.006)
Tokyo Department Store Sales (YoY) (MAR)	20-04-2018	5:30	JPY	-	0.006
Baker Hughes U.S. Rig Count (APR 20)	20-04-2018	17:00	USD	-	1008
Fed's Evans Speaks on the Economy and Monetary Policy	20-04-2018	13:40	USD	-	-

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