



21 Apr.2017

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,119	(0.2) %	(1.3) %
BSE SENSEX	29,422	0.3 %	(1.8) %
CNX BANK	21,551	0.3 %	0.0 %
CNX MIDCAP	17,800	0.0 %	2.7 %
CNX SMALLCAP	7,344	0.3 %	3.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,579	0.9 %	3.5 %
S&P 500	2,356	0.8 %	4.3 %
FTSE 100	7,119	0.1 %	(0.8) %
HANG SENG	24,042	(0.1) %	8.5 %
NIKKEI	18,621	1.0 %	(5.0) %
SHANGHAI COMPOSITE	3,173	0.0 %	1.2 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.56	(0.0) %	(4.2) %
EUR/USD	1.07	0.1 %	1.1 %
GBP/USD	1.28	0.2 %	4.1 %
USD/JPY	109.26	0.2 %	(5.8) %
USD/AUD	1.33	(0.3) %	(2.9) %
USD/SGD	1.40	(0.0) %	(2.3) %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	(0.3) %	(3.9) %
Gold(INR/10g)	29,249	(0.2) %	5.2 %
Gold Comex(USD/oz)	1,282	0.1 %	10.8 %
SILVER(INR/1Kg)	41,836	(0.1) %	7.5 %
Aluminium(USD/MT)	1,933	2.0 %	13.6 %
Copper(USD/MT)	5,612	0.2 %	0.7 %

## 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	0.0 %	(0.2) %

**Global Economy:** Pointing to continued economic growth this year, the Conference Board released a report on Thursday showing a bigger than expected increase by its index of leading US economic indicators in the month of March. The Conference Board said its leading economic index rose by 0.4% in March after climbing by a revised 0.5% in February. Results from the Federal Reserve Bank of Philadelphia's manufacturing outlook survey suggest that regional manufacturing activity continued to expand in April, but the pace of growth slowed by more than anticipated. The Philly Fed said its index for current manufacturing activity in the region fell to 22.0 in April from 32.8 in March, although a positive reading indicates continued growth.

**Global Equities:** Supportive economic cues and corporate results boosted US stocks on Thursday. The tech-heavy Nasdaq reached a new record closing high, while the Dow bounced well off its two-month closing low.

**Indian Economy:** Key benchmark indices settled with modest gains after gyrating in a small range in the positive terrain throughout the day as largely positive global cues supported gains. The Sensex gained for the second day in a row while Nifty snapped a five-day losing streak. The Sensex hit its highest closing level in one-week. Realty, IT, bank, capital goods and FMCG stocks hogged limelight in today's trade. Yes Bank dropped as the bank's bad loans rose in Q4.

**Equity Markets:** Local stocks settled with modest losses in a volatile session of trade as a strong intraday rally was derailed by sell-off in late trade. Weakness in European stocks caused reversal in intraday gains. The Sensex hit its lowest closing level in over three weeks. Reliance Industries, Sun Pharmaceutical Industries and L&T dropped. Metal and mining stocks fell as copper prices declined in global commodity markets. Bank stocks were mixed.

**Corporate News:** ACC will announce its Q1 results today, 21 April 2017. HDFC Bank unveils its Q4 results today, 21 April 2017. Reliance Industries (RIL) announced the successful and flawless commissioning of the second and final phase of Para-Xylene (PX) comprising of PX Crystallizers trains, Trans-alkylation and Aromatic Extraction units at Jamnagar. State Bank of India (SBI) said it has decided to serve notice of redemption to holders of \$400 million Hybrid Tier 1 Notes issued pursuant to SBI, acting through its Nassau branch's \$2000 million Medium Term Note programme for the redemption of the Notes on 15 May 2017. Tata Steel's board at a meeting held yesterday, 20 April 2017, reviewed the performance, capital structure and financing plan of the company. Based on the review and pursuant to the existing shareholders approval, the board approved issue of debt securities of up to Rs 9000 crore in the form either of non-convertible debentures on private placement basis or foreign currency or rupee denominated bonds or a combination thereof in one or more tranches.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(87.5)	(31.8)	(31.8)
MF(INR cr)	803.6	489.5	489.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,419	29,224	29,224
F&O(INR cr)	448,605	477,752	477,752

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.2	14.1	14.1
NSE VIX	11.6	11.7	11.7

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	21,491	(0.3) %	(0.3) %	Energy	12,069	(0.3) %	2.1 %
IT	10,039	0.9 %	(5.2) %	Pharma	10,304	(0.2) %	(1.9) %
Metals	2,920	0.1 %	(6.0) %	Finance	8,808	0.2 %	(0.2) %
Auto	9,910	0.8 %	(0.1) %	PSU	3,505	0.9 %	(0.6) %
FMCG	23,495	0.5 %	(0.6) %	Real Estate	247	2.1 %	12.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	1,158	6.6 %	11.0 %	Yes Bank	1,545	(3.8) %	0.4 %
Grasim Ind	1,147	6.0 %	9.2 %	Container	1,178	(3.3) %	16.5 %
Hind.Zinc	282	4.2 %	(3.2) %	ICICI Bank	273	(2.8) %	(4.9) %
Bank of Ba	180	2.7 %	4.2 %	Axis Bank	488	(2.3) %	(2.5) %
Godrej Con	1,690	2.7 %	(0.3) %	Oil India	324	(2.2) %	(1.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Fed's Powell Speaks on Economic Growth And Capital Markets	20-04-2017	12:00	USD	-	-
Continuing Claims (APR 08)	20-04-2017	12:30	USD	-	-
Initial Jobless Claims (APR 15)	20-04-2017	12:30	USD	-	-
Philadelphia Fed. (APR)	20-04-2017	12:30	USD	-	32.8
Leading Indicators (MAR)	20-04-2017	14:00	USD	-	0.006
EIA Natural Gas Storage Change (APR 14)	20-04-2017	14:30	USD	-	10
EIA Working Natural Gas Implied Flow (APR 14)	20-04-2017	14:30	USD	-	10
U.S. to Sell USD16 Bln 5-Year TIPS	20-04-2017	17:00	USD	-	-
Consumer Price Index (MAR)	21-04-2017	12:30	CAD	-	129.7
Consumer Price Index (MoM) (MAR)	21-04-2017	12:30	CAD	-	0.002
Consumer Price Index (YoY) (MAR)	21-04-2017	12:30	CAD	-	0.02
CPI Core- Common (YoY)% (MAR)	21-04-2017	12:30	CAD	-	0.013
CPI Core- Median (YoY)% (MAR)	21-04-2017	12:30	CAD	-	0.019
CPI Core- Trim (YoY)% (MAR)	21-04-2017	12:30	CAD	-	0.016
Money Supply M3 (YoY) (MAR)	21-04-2017	7:00	CHF	-	0.031
Markit France Composite PMI (APR P)	21-04-2017	7:00	EUR	-	56.8
Markit France Manufacturing PMI (APR P)	21-04-2017	7:00	EUR	-	53.3
Markit France Services PMI (APR P)	21-04-2017	7:00	EUR	-	57.5
Markit Germany Services PMI (APR P)	21-04-2017	7:30	EUR	-	55.6
Markit/BME Germany Composite PMI (APR P)	21-04-2017	7:30	EUR	-	57.1
Markit/BME Germany Manufacturing PMI (APR P)	21-04-2017	7:30	EUR	-	58.3
Euro-Zone Current Account n.s.a. (euros) (FEB)	21-04-2017	8:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (FEB)	21-04-2017	8:00	EUR	-	-
Markit Eurozone Composite PMI (APR P)	21-04-2017	8:00	EUR	-	56.4
Markit Eurozone Manufacturing PMI (APR P)	21-04-2017	8:00	EUR	-	56.2
Markit Eurozone Services PMI (APR P)	21-04-2017	8:00	EUR	-	56
BOE's Michael Saunders Speaks at Event in London	21-04-2017	11:45	GBP	-	-
Retail Sales (MoM) (MAR)	21-04-2017	8:30	GBP	-	0.013
Retail Sales (YoY) (MAR)	21-04-2017	8:30	GBP	-	0.041



Retail Sales Inc Auto Fuel (MoM) (MAR)	21-04-2017	8:30	GBP	-	0.014
Retail Sales Inc Auto Fuel (YoY) (MAR)	21-04-2017	8:30	GBP	-	0.037
Nikkei Japan PMI Mfg (APR P)	21-04-2017	0:30	JPY	-	52.4
Tertiary Industry Index (MoM) (FEB)	21-04-2017	4:30	JPY	-	0
ANZ Consumer Confidence (MoM) (APR)	21-04-2017	1:00	NZD	-	(0.017)
ANZ Consumer Confidence Index (APR)	21-04-2017	1:00	NZD	-	125.2
Fed's Kashkari Participates in Q&A in St. Paul, MN	21-04-2017	13:30	USD	-	-
Markit US Composite PMI (APR P)	21-04-2017	13:45	USD	-	53
Markit US Manufacturing PMI (APR P)	21-04-2017	13:45	USD	-	53.3
Markit US Services PMI (APR P)	21-04-2017	13:45	USD	-	52.8
Existing Home Sales (MAR)	21-04-2017	14:00	USD	-	-
Existing Home Sales (MoM) (MAR)	21-04-2017	14:00	USD	-	(0.037)
Baker Hughes U.S. Rig Count (APR 21)	21-04-2017	17:00	USD	-	847

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