



21 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,828	3.7 %	1.4 %
BSE SENSEX	39,353	3.7 %	1.2 %
CNX BANK	30,760	4.4 %	1.4 %
CNX MIDCAP	17,562	4.1 %	(4.2) %
CNX SMALLCAP	6,419	4.6 %	(4.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,680	(0.3) %	10.1 %
S&P 500	2,840	(0.7) %	13.3 %
FTSE 100	7,311	(0.5) %	8.6 %
HANG SENG	27,788	(0.6) %	10.6 %
NIKKEI	21,302	0.2 %	8.9 %
SHANGHAI COMPOSITE	2,871	(0.4) %	16.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.30	0.0 %	1.2 %
EUR/USD	1.12	(0.4) %	(2.6) %
GBP/USD	1.27	(1.3) %	(0.3) %
USD/JPY	110.09	0.5 %	0.4 %
USD/AUD	1.46	0.8 %	2.4 %
USD/SGD	1.38	0.7 %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	0.5 %	35.6 %
Gold(INR/10g)	31,550	(1.1) %	0.1 %
Gold Comex(USD/oz)	1,276	(0.1) %	(1.2) %
SILVER(INR/1Kg)	36,052	(0.9) %	(5.8) %
Aluminium(USD/MT)	1,786	(1.1) %	(3.9) %
Copper(USD/MT)	5,985	(0.7) %	2.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.1	(1.3) %	(1.6) %

Global Economy: Germany's economy is likely to lose momentum in the second quarter, according to the monthly report, published by Bundesbank on Monday. Germany's producer price inflation rose marginally in April, figures from Destatis showed. Producer prices climbed 2.5% year-on-year in April, faster than the 2.4% increase in March. UK households' financial wellbeing deteriorated at the fastest pace since September 2017, survey data from IHS Markit showed. The household finance index, which measures households' overall perception of financial wellbeing, dropped to 42.5 in May from April's three-month high of 43.8. Japan's gross domestic product (GDP) rose by a seasonally adjusted 0.5% on quarter in the first quarter of 2019, the Cabinet Office said in preliminary reading. This marked an increase from the downwardly revised 0.4% gain in the three months prior. On an annualized yearly basis, GDP was up 2.1% following the downwardly revised 1.6% gain in the previous three months. Nominal GDP was up 0.8% on quarter, up from 0.5% in Q4. Japan's industrial production eased in March. Industrial production fell a seasonally adjusted 0.6% month-on-month in March, less than the 0.9% decrease initially estimated. On a year-on-year basis, industrial production declined 4.3% in March. The capacity utilization rate also declined 0.4% month-on-month in March and recorded a fall of 4.5% from a year ago.

Global Equities: Markets drifted lower on Monday as China said it's in no hurry to resume trade talks with the US.

Indian Economy: The new government at the Centre will have a 'fairly robust' economic agenda and needs to support fiscal integrity and reforms, Chairman of the 15th Finance Commission, N K Singh said at an ASSOCHAM conference in New Delhi. Sharing his outlook at the ASSOCHAM National Conference on Fiscal Policy Roadmap, Singh noted that fiscal reforms will be an important ingredient of the new government.

Equity Markets: Domestic stocks logged strong gains on first trading day of the week led by index heavyweights HDFC, Reliance Industries and HDFC Bank. The Sensex and the Nifty, both, settled at record high. Sentiment was boosted after most exit polls forecast a majority for the ruling BJP-led NDA in Lok Sabha polls. After seeing a strong gap-up opening, stocks extended gains as the day's trading session progressed. The Sensex moved above the psychological 39,000 level after regaining the psychological 38,000 mark in opening trade.

Corporate News: Dr Reddy's Laboratories is planning to spend upto USD 300 million on research and development (R&D) during this financial year, according to media reports. The PE (private equity) investments into the Indian retail sector has doubled at \$1.2 billion in the last two years on back of relaxation of FDI policies - 51% FDI in multi-brand retail and 100% FDI in single-brand retail under the automatic route (against the previous 49%), as per a report by real-estate and retail consultancy firm ANAROCK. Local IT counters can witness some selling pressure following the steep surge in Indian Rupee yesterday. The rupee soared by 48 paise to the 69.74 against the US dollar after hitting an intraday high under 69.50.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(160.7)	(58.9)	71.4
MF(INR cr)	712.9	661.4	89.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	47,390	29,956	32,954
F&O(INR cr)	577,911	1,123,746	1,161,375

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.0	16.9	14.4
NSE VIX	23.7	26.3	23.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,760	4.4 %	1.4 %	Energy	16,240	4.5 %	(1.8) %
IT	15,968	0.8 %	0.8 %	Pharma	8,506	0.7 %	(9.3) %
Metals	2,899	3.3 %	(6.5) %	Finance	13,222	4.6 %	5.8 %
Auto	8,422	4.2 %	0.1 %	PSU	3,181	7.9 %	(6.0) %
FMCG	30,548	2.0 %	1.2 %	Real Estate	267	5.7 %	(0.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	815	12.6 %	(3.9) %	Dr Reddy's	2,589	(5.7) %	(7.3) %
Bank of Ba	123	9.5 %	(7.4) %	Zee Entert	363	(2.6) %	(16.0) %
Adani Port	400	9.0 %	4.5 %	Page Indus	22,465	(1.3) %	(12.0) %
IndusInd B	1,495	8.8 %	(14.3) %	Interglobe	1,455	(1.3) %	2.7 %
Motherson	127	8.5 %	(17.3) %	Bajaj Auto	3,006	(1.1) %	3.1 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Minutes of May Policy Meeting (MAY)	21-05-2019	1:30	AUD	-	-
RBA Governor Lowe Gives Speech in Brisbane	21-05-2019	2:15	AUD	-	-
Money Supply M3 (YoY) (APR)	21-05-2019	7:00	CHF	-	0.035
Euro-Zone Consumer Confidence (MAY A)	21-05-2019	14:00	EUR	-	(7.9)
ECB Vice President Guindos Speaks in London	21-05-2019	9:00	EUR	-	-
OECD Publishes Economic Outlook	21-05-2019	9:00	EUR	-	-
CBI Trends Selling Prices (MAY)	21-05-2019	10:00	GBP	-	1
CBI Trends Total Orders (MAY)	21-05-2019	10:00	GBP	-	(5)
BOE's Carney, Broadbent, Tenreyro, Saunders Speak in London	21-05-2019	8:30	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	21-05-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	21-05-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	21-05-2019	1:10	JPY	-	-
Adjusted Merchandise Trade Balance (Yen) (APR)	21-05-2019	23:50	JPY	-	-
Exports (YoY) (APR)	21-05-2019	23:50	JPY	-	(0.024)
Imports (YoY) (APR)	21-05-2019	23:50	JPY	-	0.011
Machine Orders (MoM) (MAR)	21-05-2019	23:50	JPY	-	0.018
Machine Orders (YoY) (MAR)	21-05-2019	23:50	JPY	-	(0.055)
Trade Balance (APR)	21-05-2019	23:50	JPY	-	-
Tokyo Condominium Sales (YoY) (APR)	21-05-2019	4:00	JPY	-	(0.077)
Nationwide Department Store Sales (YoY) (APR)	21-05-2019	5:30	JPY	-	0.001
Tokyo Department Store Sales (YoY) (APR)	21-05-2019	5:30	JPY	-	0.006
Retail Sales Ex Inflation (QoQ) (1Q)	21-05-2019	22:45	NZD	-	0.017
Credit Card Spending (MoM) (APR)	21-05-2019	3:00	NZD	-	(0.001)
Credit Card Spending (YoY) (APR)	21-05-2019	3:00	NZD	-	0.051
Existing Home Sales (APR)	21-05-2019	14:00	USD	-	-
Existing Home Sales (MoM) (APR)	21-05-2019	14:00	USD	-	(0.049)
Fed's Evans Discusses Economy and Monetary Policy	21-05-2019	14:45	USD	-	-
U.S. to Sell USD26 Bln 52-Week Bills	21-05-2019	15:30	USD	-	-
Fed's Boardmember Speaks to Economic Club of New York	21-05-2019	16:00	USD	-	-



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