



23 Apr.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,594	0.0 %	(0.6) %
BSE SENSEX	38,645	(1.3) %	(0.6) %
CNX BANK	29,688	0.0 %	(2.1) %
CNX MIDCAP	17,761	0.0 %	(3.1) %
CNX SMALLCAP	6,562	0.0 %	(2.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,511	(0.2) %	13.6 %
S&P 500	2,908	0.1 %	16.0 %
FTSE 100	7,460	(0.2) %	10.8 %
HANG SENG	29,963	(0.5) %	19.2 %
NIKKEI	22,218	0.1 %	13.6 %
SHANGHAI COMPOSITE	3,215	(1.7) %	30.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.34	(0.1) %	(0.1) %
EUR/USD	1.12	(0.6) %	(1.8) %
GBP/USD	1.30	(0.9) %	1.9 %
USD/JPY	111.96	(0.0) %	2.1 %
USD/AUD	1.40	0.4 %	(1.5) %
USD/SGD	1.36	0.2 %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	2.7 %	41.2 %
Gold(INR/10g)	31,560	0.5 %	0.1 %
Gold Comex(USD/oz)	1,273	0.0 %	(1.4) %
SILVER(INR/1Kg)	37,455	0.7 %	(2.1) %
Aluminium(USD/MT)	1,839	(0.1) %	(1.0) %
Copper(USD/MT)	6,448	(0.9) %	10.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.6	0.0 %	(0.1) %

Global Economy: A report released by the National Association of Realtors on Monday showed a significant pullback in US existing home sales in the month of March. NAR said existing home sales plummeted by 4.9% to an annual rate of 5.21 million in March after soaring by 11.2% to a revised rate of 5.48 million in February. IMF noted in a latest update that as China shifts from high-speed to high quality growth while aiming to control corporate leverage, it has become even more important to ensure that resources are allocated efficiently and irrespective of ownership-type (state-owned, private, foreign, or domestic) or company size.

Global Equities: DOW edged lower slightly yesterday but overall trading was subdued. Some European markets were closed in observance of Easter Monday.

Indian Economy: According to the official data, the gross new subscribers addition remained the highest at 19.81 lakh in July 2018. Job creation dropped by 1.73% in February to 15.03 lakh compared to 15.30 lakh in the same month last year, according to the latest payroll data of the Employees State Insurance Corporation (ESIC). The data showed that during September 2017 to February 2019, nearly 3 crore new subscribers joined the ESIC scheme.

Equity Markets: Local indices witnessed heavy losses on Monday, as global crude oil prices spiked. Higher crude oil prices could increase fiscal deficit, current account deficit and stoke fuel price inflation. Crude oil prices rose to the highest in almost six months as the US government reportedly said it won't renew waivers to allow buyers to buy Iranian crude. The Sensex fell 495.10 points or 1.26% to settle at 38,645.18. The Nifty 50 index fell 158.35 points or 1.35% to settle at 11,594.45.

Corporate News: Essel Propack will be watched. Blackstone announced that private equity funds managed by Blackstone have entered into a definitive agreement with Ashok Goel Trust to purchase a majority stake in Essel Propack ("EPL"), a leading global specialty packaging company and the largest global manufacturer of laminated tubes. Biocon said that its board of directors will consider and recommend a proposal for dividend and issue of bonus shares at the scheduled meeting on 25 April 2019. Mcleod Russel India has executed an agreement for sale of specified assets of Addabarie Tea Estate, Mahakali Tea Estate and Dirai Tea Estate of the company, with Luxmi Tea Company on 22 April 2019, subject to approval of appropriate authorities. Earlier, the company had entered into a non-binding term sheet with Saffron Enclave for sale of specified assets of the aforesaid three estates, which has expired on 31 March 2019. Hindustan Copper announced that its board will meet on 25 April 2019, to consider and recommend seeking members approval for raising funds through issue of equity shares through qualified institutional placement method in supersession of earlier resolution.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	156.3	182.1	182.1
MF(INR cr)	(1.6)	(129.4)	(129.4)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,565	35,944	35,944
F&O(INR cr)	847,298	1,104,135	1,104,135

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.4	13.0	13.0
NSE VIX	24.1	20.4	20.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,688	(1.8) %	(2.1) %	Energy	15,944	(2.4) %	(3.6) %
IT	16,151	0.4 %	2.0 %	Pharma	9,285	(1.3) %	(1.0) %
Metals	3,054	(1.8) %	(1.6) %	Finance	12,347	(1.8) %	(1.2) %
Auto	8,814	(1.8) %	4.7 %	PSU	3,134	(2.5) %	(7.4) %
FMCG	30,418	(0.5) %	0.7 %	Real Estate	264	(2.5) %	(1.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Wipro	288	1.2 %	10.2 %	Indiabulls	734	(8.3) %	(13.4) %
ICICI Pru	369	0.8 %	1.8 %	Yes Bank	238	(6.8) %	(13.6) %
Bharti Air	349	0.7 %	2.5 %	B P C L	340	(6.3) %	(13.2) %
Tech Mahin	805	0.6 %	2.5 %	H P C L	250	(6.3) %	(11.9) %
Infosys	721	0.6 %	(4.5) %	DLF	173	(5.5) %	(11.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ANZ Roy Morgan Weekly Consumer Confidence Index (APR 21)	23-04-2019	23:30	AUD	-	115.3
Wholesale Trade Sales (MoM) (FEB)	23-04-2019	12:30	CAD	-	0.006
Money Supply M3 (YoY) (MAR)	23-04-2019	7:00	CHF	-	0.035
Domestic Sight Deposits CHF (APR 19)	23-04-2019	8:00	CHF	-	-
Total Sight Deposits CHF (APR 19)	23-04-2019	8:00	CHF	-	-
Euro-Zone Consumer Confidence (APR A)	23-04-2019	14:00	EUR	-	(7.2)
Euro-Zone Government Debt-GDP Ratio (JUL 10)	23-04-2019	9:00	EUR	-	0.868
Corporate Service Price (YoY) (MAR)	23-04-2019	23:50	JPY	-	0.011
Nationwide Department Store Sales (YoY) (MAR)	23-04-2019	5:30	JPY	-	0.004
Tokyo Department Store Sales (YoY) (MAR)	23-04-2019	5:30	JPY	-	(0.005)
Machine Tool Orders (YoY) (MAR F)	23-04-2019	6:00	JPY	-	(0.285)
Credit Card Spending (MoM) (MAR)	23-04-2019	3:00	NZD	-	0.002
Credit Card Spending (YoY) (MAR)	23-04-2019	3:00	NZD	-	0.064
House Price Index (MoM) (FEB)	23-04-2019	13:00	USD	-	0.006
New Home Sales (MAR)	23-04-2019	14:00	USD	-	-
New Home Sales (MoM) (MAR)	23-04-2019	14:00	USD	-	0.049
Richmond Fed Manufact. Index (APR)	23-04-2019	14:00	USD	-	10
U.S. to Sell USD26 Bln 52-Week Bills	23-04-2019	15:30	USD	-	-
U.S. to Sell USD40 Bln 2-Year Notes	23-04-2019	17:00	USD	-	-

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