



24 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,583	(0.0) %	3.6 %
BSE SENSEX	34,451	0.1 %	3.8 %
CNX BANK	25,000	0.2 %	2.8 %
CNX MIDCAP	19,987	(0.1) %	4.7 %
CNX SMALLCAP	8,327	(0.1) %	5.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,449	(0.1) %	(1.5) %
S&P 500	2,670	0.0 %	(0.9) %
FTSE 100	7,399	0.4 %	(3.3) %
HANG SENG	30,254	(0.5) %	(0.9) %
NIKKEI	22,088	(0.3) %	(6.0) %
SHANGHAI COMPOSITE	3,068	(0.1) %	(8.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	66.48	0.6 %	4.4 %
EUR/USD	1.22	(0.6) %	1.7 %
GBP/USD	1.39	(0.4) %	3.1 %
USD/JPY	108.75	1.0 %	(3.5) %
USD/AUD	1.31	0.8 %	2.8 %
USD/SGD	1.32	0.6 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.4 %	13.7 %
Gold(INR/10g)	31,213	(0.3) %	6.3 %
Gold Comex(USD/oz)	1,328	(0.7) %	1.5 %
SILVER(INR/1Kg)	39,854	(0.6) %	3.2 %
Aluminium(USD/MT)	2,452	(0.4) %	8.7 %
Copper(USD/MT)	6,923	(0.2) %	(3.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

Global Economy: The US National Association of Realtors released a report showing a bigger than expected increase in existing home sales in the month of March. NAR said existing home sales rose by 1.1% to an annual rate of 5.60 million in March after surging up by 3% to a rate of 5.54 million in February. Existing home sales rose for the second consecutive month but are still down by 1.2% compared to the same month a year ago. Eurozone private sector growth remained stable in April, flash survey results from IHS Markit showed Monday. The composite output index remained unchanged at 55.2. The score was forecast to drop to 55.0. A score above 50 indicates expansion in the private sector. The unchanged reading indicated the joint-weakest expansion of business output since the start of 2017. The survey showed that lower inflows of new orders, alongside weakened optimism about the business outlook, suggests that growth could slow further in May. The services Purchasing Managers' Index rose slightly to 55.0 from 54.9 a month ago. The score was forecast to drop marginally to 54.8.

Global Equities: US stocks settled modestly lower as investors kept an eye on rising US Treasury yields. European shares declined as results from Switzerland's biggest bank, UBS, disappointed investors.

Indian Economy: Union Minister of Commerce & Industry and Civil Aviation, Suresh Prabhu said that MSMEs will reduce gap between rich and poor as they are agents of inclusive growth. Micro, Small and Medium Enterprises will help in reducing Green House Gas emissions as they are generally closer to markets leading to reduced carbon footprints. MSMEs will play a key role in employment generation thus countering jobless growth. He further said that there is a complementary relationship between big enterprises and MSMEs. Only if the small survive, the big will prosper. Big enterprises and MNCs require global value and supply chain, which is not possible without MSMEs.

Equity Markets: The local market ended the volatile session with small gains yesterday. Trading was volatile due to negative global cues and derivatives expiry later this week. Domestic market opened lower, but recovered as the session progressed. Indices hit fresh intraday high in mid-afternoon trade. Profit selling emerged at higher levels and indices managed to settle with small gains. Nifty edged up above 10600 levels in intraday moves before pulling back in closing trades. However, it settled at its highest closing level since 5 February 2018.

Corporate News: Weak Indian Rupee could offer continued support to the local IT stocks. The INR slipped nearly half a percent to 66.50 per US dollar yesterday- testing around one year low. The Board of Music Broadcast approved acquisition of Radio Business Undertaking of Ananda Offset, engaged in Radio Broadcasting Business under brand name 'Friends 91.9 FM' through Slump Sale subject to Regulatory approvals. India retained the top position as recipient of remittances with its diaspora sending around \$69 billion back home last year, the World Bank said. Remittances to India picked up sharply by 9.9%, reversing the previous year's drop, but were still short of \$70.4 billion received in 2014. Berger Paints said its board has approved an investment of Rs 200 crore to set up an integrated paint manufacturing plant in Uttar Pradesh.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(18.8)	(43.9)	(43.9)
MF(INR cr)	323.7	290.5	290.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,843	32,963	32,963
F&O(INR cr)	737,658	722,791	722,791

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.3	18.7	18.7
NSE VIX	13.2	14.5	14.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,961	0.1 %	2.6 %	Energy	13,559	0.6 %	2.0 %
IT	14,014	0.7 %	10.3 %	Pharma	8,950	1.5 %	3.8 %
Metals	3,862	(0.8) %	9.1 %	Finance	10,480	(0.2) %	2.1 %
Auto	11,497	0.5 %	4.0 %	PSU	2,818	0.7 %	(1.3) %
FMCG	28,022	(0.3) %	5.7 %	Real Estate	315	1.6 %	6.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
A B B	1,333	4.6 %	3.1 %	Indiabulls	1,321	(2.6) %	6.2 %
Aurobindo	643	3.9 %	8.4 %	Hindalco I	256	(2.5) %	21.0 %
ICICI Pru	388	3.8 %	1.0 %	Cummins In	736	(2.3) %	2.7 %
Bharat Ele	137	3.7 %	(5.2) %	General In	711	(1.6) %	(3.8) %
Cadila Hea	399	3.6 %	3.6 %	UPL	754	(1.6) %	0.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Prices Index (QoQ) (1Q)	24-04-2018	1:30	AUD	-	0.006
Consumer Prices Index (YoY) (1Q)	24-04-2018	1:30	AUD	-	0.019
Consumer Prices Index RBA Trimmed Mean (QoQ) (1Q)	24-04-2018	1:30	AUD	-	0.004
Consumer Prices Index RBA Trimmed Mean (YoY) (1Q)	24-04-2018	1:30	AUD	-	0.018
Consumer Prices Index RBA Weighted Median (QoQ) (1Q)	24-04-2018	1:30	AUD	-	0.004
Consumer Prices Index RBA Weighted Median (YoY) (1Q)	24-04-2018	1:30	AUD	-	0.02
Exports (MoM) (MAR)	24-04-2018	6:00	CHF	-	0.023
Imports (MoM) (MAR)	24-04-2018	6:00	CHF	-	(0.095)
Swiss Watch Exports (YoY) (MAR)	24-04-2018	6:00	CHF	-	0.129
German IFO Business Climate (APR)	24-04-2018	8:00	EUR	-	103.2
German IFO Current Assessment (APR)	24-04-2018	8:00	EUR	-	106.5
German IFO Expectations (APR)	24-04-2018	8:00	EUR	-	100.1
CBI Business Optimism (APR)	24-04-2018	10:00	GBP	-	13
CBI Trends Selling Prices (APR)	24-04-2018	10:00	GBP	-	18
CBI Trends Total Orders (APR)	24-04-2018	10:00	GBP	-	4
BOE Chief Cashier Cleland Moderates Panel on Cash	24-04-2018	10:35	GBP	-	-
BOE's Woods Speaks on Global Regulation in London	24-04-2018	13:10	GBP	-	-
BOE's Woods Speaks at Breakfast Briefing	24-04-2018	7:00	GBP	-	-
BOE's Andrew Hauser speaks on panel in London	24-04-2018	8:20	GBP	-	-
Central Government NCR (MAR)	24-04-2018	8:30	GBP	-	-
PSNB ex Banking Groups (MAR)	24-04-2018	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (MAR)	24-04-2018	8:30	GBP	-	-
Public Sector Net Borrowing (MAR)	24-04-2018	8:30	GBP	-	-
Coincident Index (FEB F)	24-04-2018	5:00	JPY	-	115.6
Leading Index CI (FEB F)	24-04-2018	5:00	JPY	-	105.8
Supermarket Sales (YoY) (MAR)	24-04-2018	5:00	JPY	-	0.013
Machine Tool Orders (YoY) (MAR F)	24-04-2018	6:00	JPY	-	0.281
House Price Index (MoM) (FEB)	24-04-2018	13:00	USD	-	0.008
CPI Core Inflation (MoM) (FEB)	24-04-2018	13:00	USD	-	0.0075



S&P/Case-Shiller 20-City Index n.s.a (FEB)	24-04-2018	13:00	USD	-	205.1
S&P/Case-Shiller Composite-20 (YoY) (FEB)	24-04-2018	13:00	USD	-	0.064
S&P/Case-Shiller US Home Price Index (FEB)	24-04-2018	13:00	USD	-	196.31
S&P/Case-Shiller US Home Price Index (YoY) (FEB)	24-04-2018	13:00	USD	-	0.0618
Conf. Board Expectations (APR)	24-04-2018	14:00	USD	-	106.2
Conf. Board Present Situation (APR)	24-04-2018	14:00	USD	-	159.9
Consumer Confidence Index (APR)	24-04-2018	14:00	USD	-	127.7
New Home Sales (MAR)	24-04-2018	14:00	USD	-	-
New Home Sales (MoM) (MAR)	24-04-2018	14:00	USD	-	(0.006)
Richmond Fed Manufact. Index (APR)	24-04-2018	14:00	USD	-	15
U.S. to Sell 4-Week Bills	24-04-2018	15:30	USD	-	-
U.S. to Sell USD26 Bln 52-Week Bills	24-04-2018	15:30	USD	-	-
U.S. to Sell USD32 Bln 2-Year Notes	24-04-2018	17:00	USD	-	-

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