



24 Apr.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,602	0.2 %	(0.6) %
BSE SENSEX	38,565	(0.2) %	(0.5) %
CNX BANK	29,551	0.2 %	(2.6) %
CNX MIDCAP	17,831	0.3 %	(2.7) %
CNX SMALLCAP	6,544	0.4 %	(2.9) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,656	0.6 %	14.3 %
S&P 500	2,934	0.9 %	17.0 %
FTSE 100	7,523	0.9 %	11.7 %
HANG SENG	29,963	0.0 %	19.2 %
NIKKEI	22,260	0.2 %	13.8 %
SHANGHAI COMPOSITE	3,199	(0.5) %	29.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.71	0.3 %	0.4 %
EUR/USD	1.12	(0.5) %	(1.8) %
GBP/USD	1.30	(0.5) %	1.9 %
USD/JPY	111.94	(0.1) %	2.1 %
USD/AUD	1.40	0.6 %	(1.4) %
USD/SGD	1.36	0.2 %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	0.9 %	42.5 %
Gold(INR/10g)	31,560	0.0 %	0.1 %
Gold Comex(USD/oz)	1,268	(0.4) %	(1.8) %
SILVER(INR/1Kg)	37,455	0.0 %	(2.1) %
Aluminium(USD/MT)	1,855	0.9 %	(0.2) %
Copper(USD/MT)	6,430	(0.3) %	10.1 %

FIXED INCOME

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

Global Economy: The new home sales in the US rose to their highest level in 16 months of March, according to a report released by the Commerce Department on Tuesday. The Commerce Department said new home sales soared up by 4.5% to an annual rate of 692,000 in March after jumping by 5.9% to a revised rate of 662,000 in February. Euro area government deficit narrowed at the end of 2018 as revenue increased amid a fall in expenditure, figures published by Eurostat showed Tuesday. The general government deficit to GDP eased to 0.5% in 2018 from 1% in the previous year. The government revenue rose slightly to 46.3% of GDP from 46.1%. On the other hand, government expenditure dropped to 46.8% from 47% in the previous year. The euro area government debt to GDP fell sharply at the end of last year. The government debt to GDP ratio dropped to 85.1% at the end of 2018, from 87.1% in 2017. UK's consumer spending ended Q1 2019 on a positive note, according to Visa's latest Consumer Spending Index. Following a downtick in February of -0.6%, household expenditure rose by 2.7% for the month of March. This represented the strongest spending increase for five months, though also a below-average rate of growth. Overall, the increase for the quarter was a modest 0.8%. The Bank of Japan is ready to ramp up stimulus, including through a combination of various steps, if the economy loses momentum for hitting its 2% inflation target, a senior central bank official stated, according to media reports.

Global Equities: Mood remained cautious for world stocks as traders looked for a return of normalcy after an extended weekend. However, the US stocks edged past their all-time highs on Tuesday, as stocks continued to rally from their December lows.

Indian Economy: Government of India (GoI) has announced the sale (issue/re-issue) of four dated securities for Rs 17000 crore. These include 7.32% GS 2024 (Rs 5,000 crore), 7.26% GS 2029 (Rs 6,000 crore), GS 2043 (Rs 2,000 crore) and 7.72% GS 2049 (Rs 4,000 crore). The Reserve Bank of India (RBI) on Tuesday received bids worth \$18.65 billion for its second dollar-rupee buy-sell swap auction against \$5 billion on offer. The cut-off premium or the threshold for the banks to receive any allotment was set at Rs 8.38.

Equity Markets: Local stocks remained in stress as selling stayed in place following elevated global crude oil prices. Sensex lost 80 points or 0.21% to close at 38,565 on sustained selling in banks and financial stocks. NSE Nifty ended at 11,576, down 19 points or 0.16% on the day. Stocks had hit all time highs last week but sentiments appear to have been hurt now as global Crude oil futures surged near six month highs.

Corporate News: ACC's net profit rose 38.20% to Rs 345.99 crore on 8.23% increase in net sales to Rs 3,849.63 crore in Q1 March 2019 over Q1 March 2018. Lupin said it has received a letter from the US Food and Drug Administration (USFDA) classifying the inspection conducted at its Pithampur (Indore) Unit-2 facility in January 2019 as Official Action Indicated (OAI). The USFDA has stated that this facility may be subject to regulatory or administrative action and that it may withhold approval of any pending applications or supplements in which this facility is listed. Future Retail said it has raised nearly Rs 2,000 crore through issue of warrants to its promoter group entity on a preferential basis.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	15.5	170.2	170.2
MF(INR cr)	(158.9)	(131.6)	(131.6)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,804	35,668	35,668
F&O(INR cr)	1,189,019	1,109,794	1,109,794

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.3	12.9	12.9
NSE VIX	24.7	20.7	20.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,480	(0.7) %	(2.8) %	Energy	16,011	0.4 %	(3.2) %
IT	16,166	0.1 %	2.1 %	Pharma	9,389	1.1 %	0.1 %
Metals	3,042	(0.4) %	(1.9) %	Finance	12,295	(0.4) %	(1.6) %
Auto	8,683	(1.5) %	3.2 %	PSU	3,121	(0.4) %	(7.8) %
FMCG	30,495	0.3 %	1.0 %	Real Estate	263	(0.2) %	(1.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Lupin	868	4.3 %	13.2 %	Maruti Suz	7,049	(3.7) %	3.0 %
O N G C	164	3.7 %	4.1 %	S A I L	55	(3.4) %	(0.7) %
Zee Entert	409	3.2 %	(5.2) %	Avenue Sup	1,286	(2.9) %	(13.9) %
Sun Pharma	469	3.1 %	(2.2) %	SBI Life I	600	(2.6) %	0.3 %
A B B	1,478	2.7 %	12.2 %	Yes Bank	233	(2.4) %	(15.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (MAR)	24-04-2019	1:00	AUD	-	(0.009)
Consumer Prices Index (QoQ) (1Q)	24-04-2019	1:30	AUD	-	0.005
Consumer Prices Index (YoY) (1Q)	24-04-2019	1:30	AUD	-	0.018
Consumer Prices Index RBA Trimmed Mean (QoQ) (1Q)	24-04-2019	1:30	AUD	-	0.004
Consumer Prices Index RBA Trimmed Mean (YoY) (1Q)	24-04-2019	1:30	AUD	-	0.018
Consumer Prices Index RBA Weighted Median (QoQ) (1Q)	24-04-2019	1:30	AUD	-	0.004
Consumer Prices Index RBA Weighted Median (YoY) (1Q)	24-04-2019	1:30	AUD	-	0.017
Bank of Canada Rate Decision (APR 24)	24-04-2019	14:00	CAD	-	0.0175
Credit Suisse Survey Expectations (APR)	24-04-2019	8:00	CHF	-	(26.9)
ECB Publishes Economic Bulletin	24-04-2019	8:00	EUR	-	-
German IFO Business Climate (APR)	24-04-2019	8:00	EUR	-	99.6
German IFO Current Assessment (APR)	24-04-2019	8:00	EUR	-	103.8
German IFO Expectations (APR)	24-04-2019	8:00	EUR	-	95.6
Central Government NCR (MAR)	24-04-2019	8:30	GBP	-	-
PSNB ex Banking Groups (MAR)	24-04-2019	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (MAR)	24-04-2019	8:30	GBP	-	-
Public Sector Net Borrowing (MAR)	24-04-2019	8:30	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	24-04-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	24-04-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	24-04-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	24-04-2019	1:10	JPY	-	-
Foreign Buying Japan Bonds (APR 19)	24-04-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (APR 19)	24-04-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (APR 19)	24-04-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (APR 19)	24-04-2019	23:50	JPY	-	-
All Industry Activity Index (MoM) (FEB)	24-04-2019	4:30	JPY	-	(0.002)
Coincident Index (FEB F)	24-04-2019	5:00	JPY	-	98.8
Leading Index CI (FEB F)	24-04-2019	5:00	JPY	-	97.4
PI Wholesale Sales - CPI (APR 15)	24-04-2019	12:00	MYR	-	0.0014



Bi-Weekly CPI (APR 15)	24-04-2019	13:00	MXN	-	0.0012
Bi-Weekly CPI (YoY) (APR 15)	24-04-2019	13:00	MXN	-	0.0406
MBA Mortgage Applications (APR 19)	24-04-2019	11:00	USD	-	(0.035)
DOE Cushing OK Crude Inventory (APR 19)	24-04-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (APR 19)	24-04-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (APR 19)	24-04-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (APR 19)	24-04-2019	14:30	USD	-	-
U.S. to Sell USD20 Bln 2-Year Floating Rate Notes	24-04-2019	15:30	USD	-	-
U.S. to Sell USD41 Bln 5-Year Notes	24-04-2019	17:00	USD	-	-

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