



25 Apr.2017

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|-------|---------|
| CNX NIFTY | 9,306 | 1.0 % | 0.7 % |
| BSE SENSEX | 29,656 | 1.0 % | 0.1 % |
| CNX BANK | 22,041 | 0.8 % | 2.3 % |
| CNX MIDCAP | 18,064 | 0.9 % | 4.2 % |
| CNX SMALLCAP | 7,490 | 0.8 % | 5.9 % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 20,764 | 1.1 % | 4.4 % |
| S&P 500 | 2,374 | 1.1 % | 5.2 % |
| FTSE 100 | 7,265 | 2.1 % | 1.2 % |
| HANG SENG | 24,456 | 1.3 % | 10.4 % |
| NIKKEI | 19,079 | 1.1 % | (2.6) % |
| SHANGHAI COMPOSITE | 3,135 | 0.2 % | (0.0) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 64.44 | (0.3) % | (4.4) % |
| EUR/USD | 1.09 | 1.2 % | 2.4 % |
| GBP/USD | 1.28 | (0.3) % | 3.9 % |
| USD/JPY | 110.11 | 0.9 % | (5.1) % |
| USD/AUD | 1.32 | (0.2) % | (3.3) % |
| USD/SGD | 1.39 | (0.3) % | (2.5) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 49 | (0.8) % | (5.9) % |
| Gold(INR/10g) | 29,076 | (0.8) % | 4.5 % |
| Gold Comex(USD/oz) | 1,276 | (0.8) % | 10.3 % |
| SILVER(INR/1Kg) | 41,013 | (0.9) % | 5.4 % |
| Aluminium(USD/MT) | 1,928 | (0.2) % | 13.3 % |
| 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 | 2.3 | 0.0 % | (0.2) % |

Global Economy: Germany's business confidence improved to a near six-year high in April as companies were more upbeat about their current situation. The business confidence index rose to 112.9 from a revised 112.4 in March, survey data from the Munich-based Ifo institute revealed Monday. Germany's potential economic growth is likely to slow through 2025 as the workforce is set to contract despite high immigration, Bundesbank said in its monthly report on Monday. The central bank estimates the work force to decline by 2.5 million through the middle of the next decade. The bank said the potential growth is likely to drop to 0.75% per year by 2025 from around 1.25%. British consumer confidence decreased in the three months ended March as rising price pressures damped consumer spending, results of a survey by the professional services firm Deloitte showed Monday. The consumer confidence index dropped to -7.0 in the first quarter from -6.0 in the fourth quarter.

Global Equities: US stocks jumped on Monday as investors cheered the results of the first round in the French presidential election. The Dow Jones industrial average soared more than 200 points, with Goldman Sachs and JPMorgan Chase contributing the most gains.

Indian Economy: The Reserve Bank of India's (RBI) updated prompt corrective action (PCA) framework could suggest a greater willingness to take regulatory action to address problems at struggling banks, but its implementation is only likely to be effective if it is matched by credible plans to address banks' significant asset quality issues and capital shortages, says Fitch Ratings. The RBI has tightened the thresholds - for capital ratios, NPLs, profitability and leverage - at which banks enter the PCA framework. This appears to be an acknowledgement of the significant asset quality stress in the system and that more banks are in need of regulatory intervention. PCA was previously viewed as an extraordinary step, which the RBI urged banks to make great efforts to avoid. That now looks likely to change. More than half of state-owned banks would breach at least one of the new thresholds, mainly owing to high NPLs, based on their latest financial reports.

Equity Markets: Trading for the week began on a strong note amid upbeat global cues. Both the Sensex and the Nifty settled at almost two-week high. Index linked counters stayed supported.

Corporate News: Reliance Industries' (RIL) consolidated net profit excluding exceptional items rose 16.6% to Rs 8046 crore on 45.2% growth in turnover to Rs 92889 crore in Q4 March 2017 over Q4 March 2016. The result was announced after market hours yesterday, 24 April 2017. The company's board of directors recommended a dividend of Rs 11 per share for the financial year ended 31 March 2017. Increase in revenue is primarily on account of increase in prices of refining and petrochemical products on the back of higher oil prices. Turnover was also boosted by robust growth in retail business. Gross refining margin (GRM) rose to \$11.5 per barrel in Q4 March 2017 from \$10.8 per barrel each in Q3 December 2016 and in Q4 March 2016. Indiabulls Housing Finance's consolidated net profit rose 24.4% to Rs 841 crore on 21.8% rise in total revenue to Rs 3225 crore in Q4 March 2017 over Q4 March 2016. IndusInd Bank announced that it inaugurated its third branch in Jamshedpur. Expanding presence across Jharkhand, Infosys announced it is strengthening its engineering footprint in Eastern Europe by opening its first office and delivery center (DC) in Karlovac, Croatia.



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|--------|--------|--------|
| FII(USD mm) | 193.7 | (13.3) | (13.3) |
| MF(INR cr) | 803.6 | 489.5 | 489.5 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 30,288 | 29,554 | 29,554 |
| F&O(INR cr) | 566,012 | 484,056 | 484,056 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 10.8 | 13.9 | 13.9 |
| NSE VIX | 11.6 | 11.7 | 11.7 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|-------|---------|-------------|--------|---------|---------|
| Banks | 21,857 | 1.4 % | 1.4 % | Energy | 12,273 | 0.7 % | 3.8 % |
| IT | 10,058 | 0.5 % | (5.0) % | Pharma | 10,178 | (0.3) % | (3.1) % |
| Metals | 2,926 | 0.7 % | (5.8) % | Finance | 8,954 | 1.6 % | 1.4 % |
| Auto | 9,978 | 1.2 % | 0.6 % | PSU | 3,523 | 1.4 % | (0.1) % |
| FMCG | 23,345 | 0.5 % | (1.2) % | Real Estate | 259 | 2.4 % | 18.0 % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|-------|--------|------------|--------|---------|---------|
| ACC | 1,607 | 7.5 % | 9.9 % | Lupin | 1,362 | (3.3) % | (5.1) % |
| Shree Ceme | 18,603 | 5.7 % | 8.3 % | Glenmark P | 882 | (2.4) % | 2.8 % |
| Grasim Ind | 1,180 | 4.5 % | 12.3 % | Godrej Con | 1,657 | (1.6) % | (2.3) % |
| UltraTech | 4,142 | 4.1 % | 2.9 % | Havells In | 484 | (1.3) % | 3.3 % |
| Piramal En | 2,446 | 4.0 % | 26.3 % | Cipla | 557 | (1.3) % | (6.0) % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--|------------|-----------|--------|--------|----------------|
| Chicago Fed Nat Activity Index (MAR) | 24-04-2017 | 12:30 | USD | - | 0.34 |
| Dallas Fed Manufacturing Activity (APR) | 24-04-2017 | 14:30 | USD | - | 16.9 |
| Fed's Kashkari Speaks at UCLA in Los Angeles | 24-04-2017 | 15:30 | USD | - | - |
| U.S. to Sell USD33 Bln 6-Month Bills | 24-04-2017 | 15:30 | USD | - | - |
| U.S. to Sell USD39 Bln 3-Month Bills | 24-04-2017 | 15:30 | USD | - | - |
| Fed's Kashkari Participates in Q&A at Claremont McKenna | 24-04-2017 | 19:15 | USD | - | - |
| ANZ Roy Morgan Weekly Consumer Confidence Index (23 APR) | 25-04-2017 | 23:30 | AUD | - | 112.6 |
| ECB Bank Lending Survey | 25-04-2017 | 8:00 | EUR | - | - |
| Euro Area Fourth Quarter Government Debt | 25-04-2017 | 9:00 | EUR | - | - |
| Euro Area Fourth Quarter Government Deficit | 25-04-2017 | 9:00 | EUR | - | - |
| Central Government NCR (MAR) | 25-04-2017 | 8:30 | GBP | - | - |
| PSNB ex Banking Groups (MAR) | 25-04-2017 | 8:30 | GBP | - | - |
| Public Finances (PSNCR) (Pounds) (MAR) | 25-04-2017 | 8:30 | GBP | - | - |
| Public Sector Net Borrowing (Pounds) (MAR) | 25-04-2017 | 8:30 | GBP | - | - |
| Net Migration SA (MAR) | 25-04-2017 | 22:45 | NZD | - | 6000 |
| House Price Index (MoM) (FEB) | 25-04-2017 | 13:00 | USD | - | 0 |
| S&P CoreLogic CS 20-City (MoM) SA (FEB) | 25-04-2017 | 13:00 | USD | - | 0.0086 |
| S&P/Case-Shiller Composite-20 (YoY) (FEB) | 25-04-2017 | 13:00 | USD | - | 0.0573 |
| S&P/Case-Shiller Home Price Index (FEB) | 25-04-2017 | 13:00 | USD | - | 192.81 |
| S&P/Case-Shiller US Home Price Index (FEB) | 25-04-2017 | 13:00 | USD | - | 185.51 |
| S&P/Case-Shiller US Home Price Index (YoY) (FEB) | 25-04-2017 | 13:00 | USD | - | 0.0587 |
| Conf. Board Expectations (APR) | 25-04-2017 | 14:00 | USD | - | 113.8 |
| Conf. Board Present Situation (APR) | 25-04-2017 | 14:00 | USD | - | 143.1 |
| Consumer Confidence (APR) | 25-04-2017 | 14:00 | USD | - | 125.6 |
| New Home Sales (MAR) | 25-04-2017 | 14:00 | USD | - | - |
| New Home Sales (MoM) (MAR) | 25-04-2017 | 14:00 | USD | - | 0.061 |
| Richmond Fed Manufacturing Index (APR) | 25-04-2017 | 14:00 | USD | - | 22 |
| U.S. to Sell 4-Week Bills | 25-04-2017 | 15:30 | USD | - | - |
| U.S. to Sell USD30 Bln 52-Week Bills | 25-04-2017 | 15:30 | USD | - | - |



U.S. to Sell USD26 Bln 2-Year Notes

25-04-2017 17:00

USD

- -

..... **End of Report**

