



25 Apr.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,769	0.4 %	0.9 %
BSE SENSEX	39,055	1.3 %	0.8 %
CNX BANK	29,950	0.3 %	(1.2) %
CNX MIDCAP	17,923	0.4 %	(2.2) %
CNX SMALLCAP	6,617	0.7 %	(1.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,597	(0.2) %	14.0 %
S&P 500	2,927	(0.2) %	16.8 %
FTSE 100	7,472	(0.7) %	11.0 %
HANG SENG	29,806	(0.5) %	18.6 %
NIKKEI	22,200	(0.3) %	13.5 %
SHANGHAI COMPOSITE	3,202	0.1 %	29.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.81	0.1 %	0.5 %
EUR/USD	1.12	(0.1) %	(1.9) %
GBP/USD	1.30	(0.2) %	1.7 %
USD/JPY	111.87	(0.1) %	2.1 %
USD/AUD	1.41	0.4 %	(1.0) %
USD/SGD	1.36	0.0 %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(0.6) %	41.6 %
Gold(INR/10g)	31,501	(0.2) %	(0.1) %
Gold Comex(USD/oz)	1,274	0.5 %	(1.3) %
SILVER(INR/1Kg)	37,012	(1.2) %	(3.3) %
Aluminium(USD/MT)	1,854	(0.1) %	(0.2) %
Copper(USD/MT)	6,438	0.1 %	10.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	(0.1) %	(0.1) %

Global Economy: Germany's business confidence weakened in April to its lowest level in three years, survey data from the IFO Institute showed on Wednesday. The IFO business climate indicator fell to 99.2 from an upwardly revised 99.7 in March. The latest reading was the lowest since April 2016. The business situation index also slipped to 103.3 from an upwardly revised 103.9 in March. The reading was the lowest since March 2017. The expectations measure of the survey eased to 95.2 from 95.6 as well. The UK government borrowing was the lowest in 17 years in the financial year ended March 31, the Office for National Statistics said on Wednesday. The public borrowing in the latest full financial year from April 2018 to March 2019 was GBP 24.7 billion, which was GBP 17.2 billion less than in the previous year. The full year borrowing was GBP 1.9 billion more than the GBP 22.8 billion that the Office for Budget Responsibility had forecast. Public debt at the end of March 2019 hit a record high GBP 1,801 billion or 83.1 percent of gross domestic product. The figure increased by GBP 22.1 billion from March 2018.

Global Equities: Steady undertone prevailed in world markets with the sentiments boosted by all time high levels for S&P 500. Investors also eyed earnings season.

Indian Economy: India's pharmaceutical exports rose 11% to \$19.2 billion in 2018-19, mainly driven by higher demand in regions such as North America and Europe, as per Commerce Ministry data. The pharma exports in 2017-18 stood at \$17.3 billion and \$16.7 billion in the previous fiscal. Based on a review of the evolving liquidity conditions and assessment of the durable liquidity needs going forward, the Reserve Bank Of India (RBI) has decided to conduct purchase of Government securities under Open Market Operations (OMOs) for an aggregate amount of Rs 250 billion in May 2019 through two auctions of Rs125 billion each.

Equity Markets: Key equity indices reported sharp gains, snapping three sessions of losses, helped by rally in index heavyweights Reliance Industries and HDFC twins. Auto sector pivots declined. The Sensex settled above the psychological 39,000 level. The Sensex rose 489.80 points or 1.27% to settle at 39,054.68. The index rose 530.47 points or 1.38% at the day's high of 39,095.35. The Nifty 50 index rose 150.20 points or 1.30% to settle at 11,726.15. The index rose 164.90 points or 1.42% at the day's high of 11,740.85.

Corporate News: Infosys announced that Gartner, Inc. has positioned Infosys as a Leader in its Magic Quadrant for Public Cloud Infrastructure Professional and Managed Services, Worldwide. IPCA Laboratories announced that it has entered into a share purchase agreement (SPA) to acquire 100% paid-up share capital of Ramdev Chemical for cash at Rs 108.50 crore. Ramdev Chemical is engaged in the business of manufacturing and marketing of advanced drug intermediates, fine chemicals, custom synthesis molecules and active pharmaceutical ingredients. Axis Bank, Tata Steel, Maruti Suzuki India and Nestle India will announce its January-March 2019 quarterly earnings today, 25 April 2019. State Bank of India (SBI) announced that the executive committee of the central board in its meeting held on 24th April 2019 has approved long term fund raising in single/multiple tranches upto \$2.5 billion, through a public offer and/or private placement of senior unsecured notes in US Dollar or any other convertible currency during FY 2019-2020.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(23.9)	157.2	157.2
MF(INR cr)	370.3	(91.9)	(91.9)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,986	35,563	35,563
F&O(INR cr)	1,423,405	1,129,394	1,129,394

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.1	12.9	12.9
NSE VIX	23.7	20.9	20.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,861	1.3 %	(1.5) %	Energy	16,306	1.8 %	(1.4) %
IT	16,370	1.3 %	3.3 %	Pharma	9,459	0.7 %	0.9 %
Metals	3,048	0.2 %	(1.8) %	Finance	12,467	1.4 %	(0.3) %
Auto	8,646	(0.4) %	2.8 %	PSU	3,170	1.5 %	(6.4) %
FMCG	30,631	0.4 %	1.5 %	Real Estate	265	0.6 %	(0.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
H P C L	269	5.5 %	(5.3) %	Tata Motor	224	(3.5) %	19.3 %
Bandhan Ba	606	5.2 %	14.2 %	ACC	1,606	(3.3) %	(2.5) %
UltraTech	4,395	4.7 %	8.4 %	Tata Motor	108	(3.2) %	17.1 %
B P C L	349	3.8 %	(10.9) %	ICICI Pru	363	(1.7) %	0.2 %
Avenue Sup	1,331	3.5 %	(10.8) %	MRF	55,642	(1.6) %	(7.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
CFIB Business Barometer (APR)	25-04-2019	10:00	CAD	-	55.9
SNB Publishes Quarterly Result	25-04-2019	5:25	CHF	-	-
ECB Vice President Guindos Speaks in New York	25-04-2019	12:30	EUR	-	-
CBI Business Optimism (APR)	25-04-2019	10:00	GBP	-	(23)
CBI Trends Selling Prices (APR)	25-04-2019	10:00	GBP	-	7
CBI Trends Total Orders (APR)	25-04-2019	10:00	GBP	-	1
Jobless Rate (MAR)	25-04-2019	23:30	JPY	-	0.023
Job-To-Applicant Ratio (MAR)	25-04-2019	23:30	JPY	-	1.63
Tokyo Consumer Price Index (YoY) (APR)	25-04-2019	23:30	JPY	-	0.009
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (APR)	25-04-2019	23:30	JPY	-	0.011
Tokyo CPI Ex-Fresh Food, Energy (YoY) (APR)	25-04-2019	23:30	JPY	-	0.007
Industrial Production (MoM) (MAR P)	25-04-2019	23:50	JPY	-	0.007
Industrial Production (YoY) (MAR P)	25-04-2019	23:50	JPY	-	(0.011)
Large Retailers' Sales (MAR)	25-04-2019	23:50	JPY	-	(0.018)
Retail Trade (YoY) (MAR)	25-04-2019	23:50	JPY	-	0.004
Retail Trade s.a. (MoM) (MAR)	25-04-2019	23:50	JPY	-	0.002
ANZ Consumer Confidence (MoM) (APR)	25-04-2019	22:00	NZD	-	0.008
ANZ Consumer Confidence Index (APR)	25-04-2019	22:00	NZD	-	121.8
Exports (MAR)	25-04-2019	22:45	NZD	-	-
Imports (MAR)	25-04-2019	22:45	NZD	-	-
Trade Balance (MAR)	25-04-2019	22:45	NZD	-	-
Trade Balance 12 Mth YTD (MAR)	25-04-2019	22:45	NZD	-	-
Cap Goods Orders Nondef Ex Air (MAR P)	25-04-2019	12:30	USD	-	(0.001)
Cap Goods Ship Nondef Ex Air (MAR P)	25-04-2019	12:30	USD	-	(0.001)
Continuing Claims (APR 13)	25-04-2019	12:30	USD	-	-
Durable Goods Orders (MAR P)	25-04-2019	12:30	USD	-	(0.016)
Durables Ex Transportation (MAR P)	25-04-2019	12:30	USD	-	(0.001)
Initial Jobless Claims (APR 20)	25-04-2019	12:30	USD	-	-
FIA Weekly National Core Inflation (APR 10)	25-04-2019	14:30	USD	-	0.0



Kansas City Fed Manf. Activity (APR)	25-04-2019	15:00	USD	-	10
U.S. to Sell 4-Week Bills	25-04-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	25-04-2019	15:30	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	25-04-2019	17:00	USD	-	-

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