



26 Apr.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,330	0.2 %	1.0 %
BSE SENSEX	29,943	1.0 %	0.5 %
CNX BANK	22,149	0.4 %	2.8 %
CNX MIDCAP	18,123	0.3 %	4.6 %
CNX SMALLCAP	7,524	0.5 %	6.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,996	1.1 %	5.6 %
S&P 500	2,389	0.6 %	5.8 %
FTSE 100	7,276	0.2 %	1.4 %
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	64.28	(0.5) %	(4.7) %
EUR/USD	1.09	1.9 %	3.1 %
GBP/USD	1.28	0.2 %	4.4 %
USD/JPY	111.20	1.9 %	(4.1) %
USD/AUD	1.33	0.3 %	(2.8) %
USD/SGD	1.39	(0.3) %	(2.6) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	(4.0) %	(5.3) %
Gold(INR/10g)	28,972	(0.4) %	4.2 %
Gold Comex(USD/oz)	1,265	(0.8) %	9.3 %
SILVER(INR/1Kg)	41,003	(0.0) %	5.3 %
Aluminium(USD/MT)	1,943	0.8 %	14.2 %
Copper(USD/MT)	5,653	0.7 %	1.4 %

**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	0.1 %	(0.1) %

**Global Economy:** After reporting notable increases in US consumer confidence over the two previous months, the Conference Board released a report on Tuesday showing that consumer confidence pulled back by more than expected in the month of April. The Conference Board said its consumer confidence index fell to 120.3 in April from a revised 124.9 in March. New home sales in the US saw a substantial increase in the month of March, according to a report released by the Commerce Department on Tuesday. The Commerce Department said new home sales jumped by 5.8% to an annual rate of 621,000 in March from a revised 587,000 in February.

**Global Equities:** US stocks rallied on upbeat earnings. DOW added to the strong gains posted in the previous session. With the continued upward move, the tech-heavy Nasdaq soared to a new record closing high.

**Indian Economy:** India's natural gas production increased 8.3% to 2.75 billion cubic meters (bcm) in March 2017 over a year ago. Natural gas output of ONGC jumped 20.1% to 1.97 bcm, but that of private and JV companies dipped 18.1% to 0.53 bcm. Meanwhile, the natural gas production of Oil India fell 1.0% to 0.25 bcm in March 2017. Natural gas output declined 1.1% to 31.90 bcm in April-March 2017 over April-March 2016.

**Equity Markets:** Key benchmark indices logged strong gains in sync with upbeat global equities. The Sensex hit its highest closing level in almost three weeks. The Nifty hit a record high on intraday as well as closing basis. The gains were led by index heavyweights ITC, HDFC and Reliance Industries (RIL). Key indices gained for the second day in a row.

**Corporate News:** Wipro's consolidated net profit rose 7.2% to Rs 2267 crore on 4.86% rise in total income to Rs 15033.80 crore in Q4 March 2017 over Q3 December 2016. Abidali Z. Neemuchwala, Chief Executive Officer and Member of the Board said that the company is confident that the recovery in energy and utilities and demonstrated strength in digital will help improve growth trajectory during the course of the current financial year. LIC Housing Finance's net profit rose 18.12% to Rs 529.18 crore on 11.85% rise in total revenue to Rs 3661.86 crore in Q4 March 2017 over Q4 March 2016. Mahindra & Mahindra (M&M) announced that Mahindra Overseas Investment Company (Mauritius) (MOICML), a wholly owned subsidiary of the company, has acquired 100% of the equity share capital of Mahindra Automotive North America Inc. (MANA) in USA. In view of this, MANA has become a wholly owned subsidiary of MOICML and in turn, of the company with effect from 25 April 2017. Adani Ports and Special Economic Zone (APSEZ), achieved a new milestone in the ports infrastructure industry in India, with a strategic collaboration with CMA Terminals (CMAT) - part of the France based CMA CGM group, owner of one of the world's leading Container Carriers and port operators.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(35.2)	(14.9)	(14.9)
MF(INR cr)	803.6	489.5	489.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,317	29,805	29,805
F&O(INR cr)	599,422	491,747	491,747

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.8	13.7	13.7
NSE VIX	11.2	11.6	11.6

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	22,055	0.9 %	2.4 %	Energy	12,407	1.1 %	5.0 %
IT	10,091	0.3 %	(4.7) %	Pharma	10,241	0.6 %	(2.5) %
Metals	2,946	0.7 %	(5.1) %	Finance	9,056	1.1 %	2.6 %
Auto	10,090	1.1 %	1.7 %	PSU	3,548	0.7 %	0.6 %
FMCG	23,765	1.8 %	0.5 %	Real Estate	262	1.5 %	19.8 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Godrej Con	1,753	5.8 %	3.3 %	Petronet L	428	(1.2) %	3.4 %
Bajaj Fin.	1,342	5.5 %	13.5 %	Torrent Ph	1,450	(1.0) %	(3.7) %
Bharti Inf	375	4.7 %	13.9 %	Interglobe	1,110	(1.0) %	6.4 %
ICICI Pru	420	4.3 %	9.0 %	Hind.Zinc	273	(0.9) %	(6.5) %
Punjab Nat	161	3.8 %	7.4 %	Tata Power	85	(0.9) %	(4.5) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
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 USD20 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	-	-
Skilled Vacancies (MoM) (MAR)	26-04-2017	1:00	AUD	-	0.001
Consumer Prices Index (QoQ) (1Q)	26-04-2017	1:30	AUD	-	0.005
Consumer Prices Index (YoY) (1Q)	26-04-2017	1:30	AUD	-	0.015
Consumer Prices Index RBA Trimmed Mean (QoQ) (1Q)	26-04-2017	1:30	AUD	-	0.004
Consumer Prices Index RBA Trimmed Mean (YoY) (1Q)	26-04-2017	1:30	AUD	-	0.016
Consumer Prices Index RBA Weighted Median (QoQ) (1Q)	26-04-2017	1:30	AUD	-	0.004
Consumer Prices Index RBA Weighted Median (YoY) (1Q)	26-04-2017	1:30	AUD	-	0.015
Retail Sales (MoM) (FEB)	26-04-2017	12:30	CAD	-	0.022
Retail Sales Less Autos (MoM) (FEB)	26-04-2017	12:30	CAD	-	0.017
UBS Consumption Indicator (MAR)	26-04-2017	6:00	CHF	-	1.5
Credit Suisse Survey Expectations (APR)	26-04-2017	8:00	CHF	-	29.6
Foreign Buying Japan Bonds (Yen) (21 APR)	26-04-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (21 APR)	26-04-2017	23:50	JPY	-	-
Foreign Buying Japanese Bonds (Yen) (21 APR)	26-04-2017	23:50	JPY	-	-



Japan Buying Foreign Stocks (Yen) (21 APR)	26-04-2017	23:50	JPY	-	-
All Industry Activity Index (MoM) (FEB)	26-04-2017	4:30	JPY	-	0.001
Small Business Confidence (APR)	26-04-2017	5:00	JPY	-	50.5
Machine Tool Orders (YoY) (MAR F)	26-04-2017	6:00	JPY	-	0.226
Credit Card Spending (MoM) (MAR)	26-04-2017	3:00	NZD	-	(0.014)
Credit Card Spending (YoY) (MAR)	26-04-2017	3:00	NZD	-	0.053
MBA Mortgage Applications (21 APR)	26-04-2017	11:00	USD	-	(0.018)
Revisions: Retail Sales	26-04-2017	14:00	USD	-	-
DOE Cushing OK Crude Inventory (21 APR)	26-04-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (21 APR)	26-04-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (21 APR)	26-04-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (21 APR)	26-04-2017	14:30	USD	-	-
U.S. to Sell USD15 Bln 2-Year Floating Rate Notes	26-04-2017	15:30	USD	-	-
U.S. to Sell USD34 Bln 5-Year Notes	26-04-2017	17:00	USD	-	-

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