



26 Apr.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,571	0.0 %	3.5 %
BSE SENSEX	34,501	(0.3) %	3.6 %
CNX BANK	24,814	0.0 %	2.0 %
CNX MIDCAP	19,913	0.0 %	4.3 %
CNX SMALLCAP	8,237	0.0 %	3.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,084	0.3 %	(3.0) %
S&P 500	2,639	0.2 %	(2.1) %
FTSE 100	7,379	(0.6) %	(3.5) %
HANG SENG	30,328	(1.0) %	(0.6) %
NIKKEI	22,215	(0.3) %	(5.5) %
SHANGHAI COMPOSITE	3,118	(0.4) %	(6.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	66.90	0.6 %	5.1 %
EUR/USD	1.22	(0.3) %	1.4 %
GBP/USD	1.39	0.0 %	3.2 %
USD/JPY	109.34	0.5 %	(3.0) %
USD/AUD	1.32	0.5 %	3.2 %
USD/SGD	1.33	0.3 %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.0 %	13.7 %
Gold(INR/10g)	31,304	0.6 %	6.6 %
Gold Comex(USD/oz)	1,331	0.2 %	1.7 %
SILVER(INR/1Kg)	39,411	0.4 %	2.1 %
Aluminium(USD/MT)	2,222	(9.4) %	(1.5) %
Copper(USD/MT)	6,987	0.9 %	(2.7) %

FIXED INCOME

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

Global Economy: Germany's construction orders grew notably in February, figures from Destatis showed Wednesday. New orders in the main construction industry jumped 9.9% month-over-month in February. Orders surged 13% in February from a year earlier. During the first two months of the year, new orders advanced 9% compared with the same period of 2017. Japan all industry activity rose 0.4% month-over-month in February, reversing a 0.1% drop in January, data from the Ministry of Economy, Trade and Industry showed Wednesday. Industrial production expanded 2% over the month, while construction activity index dropped by 0.3% and tertiary activity showed no variations. On a yearly basis, all industry activity growth eased to 1.1% in February from 1.8 percent in the prior month.

Global Equities: European markets were trading lower as rising yields in the bond markets offset positive sentiment surrounding corporate earnings. Asian shares fell across the board, following an overnight drop in US stocks. Rising bond yields also worried investors.

Indian Economy: Domestic Bank's credit rose 11.52% increase year-on-year to Rs 84,78,459 crore in the fortnight ended April 13, RBI data showed. In the previous fortnight ended March 30, 2018, banks loans grew by 10.32% to Rs 86,50,714 crore from Rs 78,41,466 crore in the period ended March 31. Deposits grew at around 8% to Rs 113,77,729 crore in the period ended April 13, as against Rs 105,38,304 crore in the year-ago fortnight. In February 2018, non-food bank credit increased by 9.8% on a year-on-year basis as against an increase of 3.3% in February 2017.

Equity Markets: A late correction hit local stocks, easing from near two and half month highs. Indices logged modest losses as investors booked profits amid weakness in global stock markets. Recent firmness in crude oil prices too worried investors. After a negative opening, market slipped further in morning trade. Indices staged a recovery in afternoon trade. However, fresh selling pressure dragged indices lower in mid-afternoon trade.

Corporate News: IT stocks could see continued support on weak movement in the Indian Rupee. The INR fell near 66.75 mark against the US dollar - its fresh 13 month low. VIP Industries will invest around Rs 80 crore in the ongoing financial year on advertisement and promotions for all its brands. IT firm Wipro reported a 20.5% YoY fall in consolidated net profit at Rs 1,800.80 crore for the March quarter against Rs 2,267 crore last year. On a sequential basis, the profit was down 6.7%.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(82.6)	(45.9)	(45.9)
MF(INR cr)	408.5	461.5	461.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,310	33,283	33,283
F&O(INR cr)	999,041	737,599	737,599

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.0	18.7	18.7
NSE VIX	12.4	14.2	14.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,814	(0.9) %	2.0 %	Energy	13,785	(0.4) %	3.7 %
IT	13,892	1.1 %	9.3 %	Pharma	8,901	(0.9) %	3.3 %
Metals	3,736	(1.4) %	5.6 %	Finance	10,467	(0.8) %	2.0 %
Auto	11,504	(0.2) %	4.0 %	PSU	2,744	(1.6) %	(3.9) %
FMCG	28,013	(0.2) %	5.7 %	Real Estate	318	0.6 %	7.4 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Pru	438	4.8 %	13.9 %	Bank of Ba	136	(3.9) %	(3.9) %
Bharti Air	420	3.3 %	6.3 %	Petronet L	229	(3.8) %	(0.6) %
Ashok Leyl	164	3.2 %	10.9 %	GAIL (Indi	328	(3.0) %	0.8 %
SBI Life I	766	2.7 %	12.0 %	Godrej Con	1,093	(3.0) %	(2.0) %
TCS	3,470	2.5 %	19.3 %	B H E L	86	(2.9) %	4.1 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Export Price Index (QoQ) (1Q)	26-04-2018	1:30	AUD	-	0.028
Import price index (QoQ) (1Q)	26-04-2018	1:30	AUD	-	0.02
SNB 1Q Earnings	26-04-2018	5:25	CHF	-	-
ECB Deposit Facility Rate (APR 26)	26-04-2018	11:45	EUR	-	(0.004)
ECB Marginal Lending Facility (APR 26)	26-04-2018	11:45	EUR	-	0.0025
European Central Bank Rate Decision (APR 26)	26-04-2018	11:45	EUR	-	0
ECB President Draghi's Media Briefing After Policy Decision	26-04-2018	12:30	EUR	-	-
German GfK Consumer Confidence (MAY)	26-04-2018	6:00	EUR	-	10.9
CBI Reported Sales (APR)	26-04-2018	10:00	GBP	-	(8)
CBI Total Dist. Reported Sales (APR)	26-04-2018	10:00	GBP	-	5
GfK Consumer Confidence (APR)	26-04-2018	23:01	GBP	-	(7)
BBA Loans for House Purchase (MAR)	26-04-2018	8:30	GBP	-	38120
BOE's Alex Brazier Speaks in London	26-04-2018	8:30	GBP	-	-
Jobless Rate (MAR)	26-04-2018	23:30	JPY	-	0.025
Job-To-Applicant Ratio (MAR)	26-04-2018	23:30	JPY	-	1.58
Tokyo Consumer Price Index (YoY) (APR)	26-04-2018	23:30	JPY	-	0.01
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (APR)	26-04-2018	23:30	JPY	-	0.008
Tokyo CPI Ex-Fresh Food, Energy (YoY) (APR)	26-04-2018	23:30	JPY	-	0.005
Industrial Production (MoM) (MAR P)	26-04-2018	23:50	JPY	-	0.02
Industrial Production (YoY) (MAR P)	26-04-2018	23:50	JPY	-	0.016
Large Retailers' Sales (MAR)	26-04-2018	23:50	JPY	-	0.006
Retail Trade (YoY) (MAR)	26-04-2018	23:50	JPY	-	0.016
Retail Trade s.a. (MoM) (MAR P)	26-04-2018	23:50	JPY	-	0.004
ANZ Consumer Confidence (MoM) (APR)	26-04-2018	22:00	NZD	-	0.002
ANZ Consumer Confidence Index (APR)	26-04-2018	22:00	NZD	-	128
Exports (MAR)	26-04-2018	22:45	NZD	-	-
Imports (MAR)	26-04-2018	22:45	NZD	-	-
Trade Balance (MAR)	26-04-2018	22:45	NZD	-	-
Trade Balance (YoY) (MAR)	26-04-2018	22:45	NZD	-	-



Advance Goods Trade Balance (MAR)	26-04-2018	12:30	USD	-	-
Cap Goods Orders Nondef Ex Air (MAR P)	26-04-2018	12:30	USD	-	0.014
Cap Goods Ship Nondef Ex Air (MAR P)	26-04-2018	12:30	USD	-	0.014
Continuing Claims (APR 14)	26-04-2018	12:30	USD	-	-
Durable Goods Orders (MAR P)	26-04-2018	12:30	USD	-	0.03
Durables Ex Transportation (MAR P)	26-04-2018	12:30	USD	-	0.01
Initial Jobless Claims (APR 21)	26-04-2018	12:30	USD	-	-
Retail Inventories (MoM) (MAR)	26-04-2018	12:30	USD	-	0.004
Wholesale Inventories (MoM) (MAR P)	26-04-2018	12:30	USD	-	0.01
EIA Natural Gas Storage Change (APR 20)	26-04-2018	14:30	USD	-	(36)
EIA Working Natural Gas Implied Flow (APR 20)	26-04-2018	14:30	USD	-	(36)
Kansas City Fed Manf. Activity (APR)	26-04-2018	15:00	USD	-	17
U.S. to Sell USD29 Bln 7-Year Notes	26-04-2018	17:00	USD	-	-

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