



27 Apr.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,652	0.3 %	4.3 %
BSE SENSEX	34,714	0.6 %	4.4 %
CNX BANK	25,011	0.0 %	2.8 %
CNX MIDCAP	19,987	0.0 %	4.7 %
CNX SMALLCAP	8,238	0.0 %	3.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,322	1.0 %	(2.0) %
S&P 500	2,667	1.0 %	(1.1) %
FTSE 100	7,421	0.6 %	(3.0) %
HANG SENG	30,008	(1.1) %	(1.7) %
NIKKEI	22,320	0.5 %	(5.0) %
SHANGHAI COMPOSITE	3,075	(1.4) %	(8.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	66.75	0.6 %	4.8 %
EUR/USD	1.21	(1.0) %	0.8 %
GBP/USD	1.39	(0.4) %	3.0 %
USD/JPY	109.17	0.3 %	(3.2) %
USD/AUD	1.32	0.4 %	3.5 %
USD/SGD	1.33	0.3 %	(0.6) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(0.9) %	12.7 %
Gold(INR/10g)	31,289	(0.0) %	6.6 %
Gold Comex(USD/oz)	1,325	(0.4) %	1.3 %
SILVER(INR/1Kg)	39,297	(0.3) %	1.8 %
Aluminium(USD/MT)	2,248	1.2 %	(0.4) %
Copper(USD/MT)	6,961	(0.4) %	(3.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.6 %

**Global Economy:** Remittances to low- and middle-income countries rebounded to a record level in 2017 after two consecutive years of decline, says the World Bank's latest Migration and Development Brief. The Bank estimates that officially recorded remittances to low- and middle-income countries reached \$466 billion in 2017, an increase of 8.5% over \$429 billion in 2016. Global remittances, which include flows to high-income countries, grew 7% to \$613 billion in 2017. Remittance inflows improved in all regions and the top remittance recipients were India with \$69 billion, followed by China (\$64 billion), the Philippines (\$33 billion), Mexico (\$31 billion), Nigeria (\$22 billion), and Egypt (\$20 billion). The European Central Bank (ECB) held interest rates steady on Thursday. The ECB's interest rate on its main refinancing operations and the interest rates on the marginal lending facility and the deposit facility remained unchanged at zero, 0.25% and -0.40% respectively.

**Global Equities:** Earnings hogged the limelight for world markets as investors looked at the stock specific updates after recent volatility in the marketplace.

**Indian Economy:** After hitting historic high of \$84.44 billion last year, China's trade with India saw a robust growth in the first quarter this year, with bilateral trade netting \$22.1 billion, up 15.4% year-on-year.

**Equity Markets:** Key benchmark indices logged modest gains in volatile session of trade. Trading was volatile as traders rolled over positions in the F&O segment from the near month April 2018 series to May 2018 series. Domestic stocks drifted higher in early trade. Stocks saw modest gains till mid-morning trade. Indices trimmed gains in early afternoon trade. Equities traded with small gains in afternoon trade. Indices extended gains and hit fresh intraday high in late trade.

**Corporate News:** YES Bank reported 29% YoY rise in net profit at Rs 1,179.40 crore. The company made Rs 399.60 crore worth of provisions for the March quarter, which were 29% higher than Rs 309.70 crore it made in the year-ago quarter. Net Interest Income (NII) for the quarter rose 31.4% YoY to Rs 2,154.20 crore. Net interest margin (NIM) for the quarter came in at 3.4%. A drop in global Copper prices can weigh on local metals and mining counters. COMEX Copper extended its recent losses sliding for a third straight session as a drop from a one month high continued. ABB inaugurated a microgrid solution at its Vadodara facility that will harness solar power and reduce its carbon footprint. This is the first of its kind to be installed at a manufacturing campus in India, the company said.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(15.0)	(44.2)	(44.2)
MF(INR cr)	408.5	461.5	461.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	44,483	33,872	33,872
F&O(INR cr)	1,414,095	773,204	773,204

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.8	18.7	18.7
NSE VIX	12.0	14.1	14.1

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,011	0.8 %	2.8 %	Energy	13,825	0.3 %	4.0 %
IT	14,027	1.0 %	10.4 %	Pharma	8,897	(0.1) %	3.2 %
Metals	3,738	0.0 %	5.6 %	Finance	10,481	0.1 %	2.1 %
Auto	11,535	0.3 %	4.3 %	PSU	2,712	(1.2) %	(5.0) %
FMCG	28,342	1.2 %	6.9 %	Real Estate	316	(0.7) %	6.7 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	352	8.3 %	15.1 %	Idea Cellu	68	(4.2) %	(12.1) %
Hind. Unil	1,491	2.2 %	10.4 %	Bharti Inf	316	(2.9) %	(6.4) %
TCS	3,539	2.0 %	21.6 %	Lupin	793	(2.7) %	2.0 %
JSW Steel	328	1.9 %	10.5 %	Bharti Air	409	(2.5) %	3.6 %
IndusInd B	1,882	1.8 %	4.3 %	Power Fin.	83	(2.5) %	(4.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Producer Price Index (QoQ) (1Q)	27-04-2018	1:30	AUD	-	0.006
Producer Price Index (YoY) (1Q)	27-04-2018	1:30	AUD	-	0.017
Swiss National Bank Releases 1Q 2018 Currency Allocation	27-04-2018	5:30	CHF	-	-
SNB's Jordan, Studer Speak at Central Bank's AGM in Bern	27-04-2018	8:00	CHF	-	-
Industrial Profits (YoY) (MAR)	27-04-2018	1:30	CNY	-	0.108
French Gross Domestic Product (QoQ) (1Q A)	27-04-2018	5:30	EUR	-	0.007
French Gross Domestic Product (YoY) (1Q A)	27-04-2018	5:30	EUR	-	0.025
ECB's Mersch Speaks in Sofia	27-04-2018	5:45	EUR	-	-
German Import Price Index (MoM) (MAR)	27-04-2018	6:00	EUR	-	(0.006)
German Import Price Index (YoY) (MAR)	27-04-2018	6:00	EUR	-	(0.006)
ECB's Lautenschlaeger Speaks in Sofia	27-04-2018	6:45	EUR	-	-
German Unemployment Change (000's) (APR)	27-04-2018	7:55	EUR	-	-
German Unemployment Claims Rate s.a. (APR)	27-04-2018	7:55	EUR	-	0.053
ECB Survey of Professional Forecasters	27-04-2018	8:00	EUR	-	-
Euro-Zone Business Climate Indicator (APR)	27-04-2018	9:00	EUR	-	1.34
Euro-Zone Consumer Confidence (APR F)	27-04-2018	9:00	EUR	-	0.4
Euro-Zone Economic Confidence (APR)	27-04-2018	9:00	EUR	-	112.6
Euro-Zone Industrial Confidence (APR)	27-04-2018	9:00	EUR	-	6.4
Euro-Zone Services Confidence (APR)	27-04-2018	9:00	EUR	-	16.3
BOE's Carney Speaks in London	27-04-2018	14:00	GBP	-	-
BOE's Andy Haldane Chairs Panel in London	27-04-2018	14:15	GBP	-	-
Nationwide House PX (MoM) (APR)	27-04-2018	6:00	GBP	-	(0.002)
Nationwide House Px n.s.a. (YoY) (APR)	27-04-2018	6:00	GBP	-	0.021
Gross Domestic Product (QoQ) (1Q A)	27-04-2018	8:30	GBP	-	0.004
Gross Domestic Product (YoY) (1Q A)	27-04-2018	8:30	GBP	-	0.014
Index of Services (3Mo3M) (FEB)	27-04-2018	8:30	GBP	-	0.006
Index of Services (MoM) (FEB)	27-04-2018	8:30	GBP	-	0.002
Vehicle Production (YoY) (MAR)	27-04-2018	4:00	JPY	-	(0.001)
Annualized Housing Starts (MAR)	27-04-2018	5:00	USD	-	-



Construction Orders (YoY) (MAR)	27-04-2018	5:00	JPY	-	0.192
Housing Starts (YoY) (MAR)	27-04-2018	5:00	JPY	-	(0.026)
Core PCE (QoQ) (1Q A)	27-04-2018	12:30	USD	-	0.019
Employment Cost Index (1Q)	27-04-2018	12:30	USD	-	0.006
Gross Domestic Product Annualized (QoQ) (1Q A)	27-04-2018	12:30	USD	-	0.029
Gross Domestic Product Price Index (1Q A)	27-04-2018	12:30	USD	-	0.023
Personal Consumption (1Q A)	27-04-2018	12:30	USD	-	0.04
U. of Mich. 1 Yr Inflation (APR F)	27-04-2018	14:00	USD	-	0.027
U. of Mich. 5-10 Yr Inflation (APR F)	27-04-2018	14:00	USD	-	0.024
U. of Mich. Current Conditions (APR F)	27-04-2018	14:00	USD	-	115
U. of Mich. Expectations (APR F)	27-04-2018	14:00	USD	-	86.8
U. of Mich. Sentiment (APR F)	27-04-2018	14:00	USD	-	97.8
Baker Hughes U.S. Rig Count (APR 27)	27-04-2018	17:00	USD	-	1013

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