



27 May.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,844	1.6 %	1.5 %
BSE SENSEX	39,435	1.6 %	1.4 %
CNX BANK	31,213	2.6 %	2.9 %
CNX MIDCAP	17,700	2.2 %	(3.5) %
CNX SMALLCAP	6,549	2.7 %	(2.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,586	0.4 %	9.7 %
S&P 500	2,826	0.1 %	12.7 %
FTSE 100	7,278	0.7 %	8.1 %
HANG SENG	27,354	0.3 %	8.8 %
NIKKEI	21,117	(0.2) %	8.0 %
SHANGHAI COMPOSITE	2,853	0.0 %	15.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.61	(0.1) %	0.2 %
EUR/USD	1.12	(0.0) %	(2.6) %
GBP/USD	1.26	(0.2) %	(0.8) %
USD/JPY	109.94	(0.4) %	0.3 %
USD/AUD	1.45	0.0 %	2.3 %
USD/SGD	1.38	0.1 %	1.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	18.6 %	47.6 %
Gold(INR/10g)	31,591	(0.3) %	0.2 %
Gold Comex(USD/oz)	1,284	0.1 %	(0.5) %
SILVER(INR/1Kg)	36,343	(0.1) %	(5.0) %
Aluminium(USD/MT)	1,762	1.2 %	(5.2) %
Copper(USD/MT)	5,919	1.0 %	1.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.3	(0.0) %	(0.3) %

Global Economy: After reporting a notable rebound in new orders for US durable goods in the previous month, the Commerce Department showed that durable goods orders pulled back in the month of April. The durable goods orders plummeted by 2.1% in April after jumping by a downwardly revised 1.7% in March. The UK retail sales volume remained unchanged month-on-month, after rising 1.2% in March. At the same time, sales excluding auto fuel dropped 0.2%, in contrast to March's 1.4% increase. On a yearly basis, retail sales including auto fuel, increased 5.2% after expanding 6.7% a month ago. Russia's growth prospects will depend on the strength of domestic policies and reforms. GDP growth in the past three years averaged 1.4% and is projected at a similar rate in 2019, according to a latest update from the International Monetary Fund (IMF). External support is expected to be limited, as sanctions, global political and trade uncertainty and lower oil prices have replaced the favorable external conditions that contributed to rapid growth in the 2000s boom. Japan's all industry activity index declined 0.4 percent month-on-month in March, following a 0.2% drop in February. Among components, construction industry activity increased 0.3%, slower than 1.5% rise in February. At the same time, industrial production declined 0.6%, reversing a 0.7% gain in February.

Global Equities: US stocks saw some bargain buying on Friday as President Donald Trump said he remains hopeful of a US-China trade deal.

Indian Economy: The Reserve Bank of India proposed a set of strict norms for non-banking financial companies (NBFCs), including mandatory investments in government bonds and maintenance of cash thresholds, to enable them to tide over liquidity problems without causing disruptions to the broader financial system. The RBI has also proposed that asset-liability mismatches at NBFCs not go beyond 20% of the outflows. The regulator has further suggested that NBFCs publicly disclose their funding concentration by way of both instruments and counterparties. The Liquidity Coverage Ratio (LCR) rule for NBFCs begins April 2020, and thresholds must be implemented in stages by March 2024.

Equity Markets: Key benchmark indices logged strong gains on last trading day of the week on steady buying demand in index pivots. Sentiment was boosted by an overnight slide in crude oil prices. Narendra Modi-led NDA's thumping victory in Lok Sabha polls also supported buying. The Sensex settled above the psychological 39,000 mark after moving above and below that level in intraday trade. The Sensex and the Nifty, both, settled at record high.

Corporate News: Fortis Healthcare reported a consolidated net profit of Rs 151.19 crore for Q4FY19, as against a net loss of Rs 914.32 crore in the corresponding period of the previous fiscal. Consolidated revenue from operations increased to Rs 1,184.15 crore from Rs 1,086.38 crore in the same quarter a year ago. NTPC Limited reported a net profit of Rs 4,350.32 crore for Q4FY19. This represents a 48.7% increase over the net profit of Rs 2,925.59 crore recorded in same quarter of the previous financial year. The company's board also recommended 25 per cent dividend. NIIT said its consolidated net profit rose 18% to Rs 23.2 crore in Q4FY19, helped by increased productivity and turnaround in its skills and careers (SNC) business. The company had posted a net profit of Rs 19.7 crore in the year-ago period. Its revenue grew 8% to Rs 239.7 crore in the quarter under review from Rs 222.8 crore in the year-ago period. PNC Infratech reported a 25% jump in net profit at Rs 139.93 crore for Q4FY19. The company's total income rose to Rs 1,087.96 crore from Rs 765.52 crore in the year-ago-quarter.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(106.3)	(23.9)	75.4
MF(INR cr)	65.6	437.9	57.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	45,128	33,446	34,269
F&O(INR cr)	981,158	1,131,282	1,160,752

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.9	16.6	14.6
NSE VIX	16.5	25.3	23.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,213	2.6 %	2.9 %	Energy	16,267	0.9 %	(1.6) %
IT	15,570	0.2 %	(1.7) %	Pharma	8,608	1.3 %	(8.2) %
Metals	2,904	2.9 %	(6.4) %	Finance	13,304	2.1 %	6.4 %
Auto	8,460	3.0 %	0.5 %	PSU	3,327	5.6 %	(1.7) %
FMCG	29,965	0.8 %	(0.8) %	Real Estate	280	4.4 %	4.8 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Bank of Ba	137	7.7 %	3.5 %	Bandhan Ba	596	(3.2) %	12.5 %
DLF	192	6.1 %	(2.0) %	Havells In	744	(1.1) %	(4.1) %
Ashok Leyl	94	5.6 %	3.8 %	Tech Mahin	736	(1.0) %	(6.3) %
S A I L	52	5.3 %	(6.2) %	NTPC	129	(0.5) %	(4.4) %
ICICI Bank	432	5.1 %	8.4 %	TCS	2,048	(0.3) %	0.8 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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