



29 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,689	0.8 %	4.7 %
BSE SENSEX	35,165	0.7 %	5.7 %
CNX BANK	26,614	1.3 %	9.4 %
CNX MIDCAP	19,052	1.4 %	(0.2) %
CNX SMALLCAP	7,950	1.7 %	0.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,753	(0.2) %	(0.3) %
S&P 500	2,721	(0.2) %	0.9 %
FTSE 100	7,730	0.2 %	1.1 %
HANG SENG	30,792	0.7 %	0.9 %
NIKKEI	22,481	0.1 %	(4.4) %
SHANGHAI COMPOSITE	3,135	(0.2) %	(6.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.42	(1.4) %	5.9 %
EUR/USD	1.16	(0.7) %	(3.2) %
GBP/USD	1.33	(0.4) %	(1.5) %
USD/JPY	109.01	(0.5) %	(3.3) %
USD/AUD	1.33	0.6 %	3.9 %
USD/SGD	1.34	0.2 %	0.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(4.0) %	12.4 %
Gold(INR/10g)	30,901	(0.9) %	5.3 %
Gold Comex(USD/oz)	1,306	(0.1) %	(0.2) %
SILVER(INR/1Kg)	39,359	(2.2) %	2.0 %
Aluminium(USD/MT)	2,282	0.5 %	1.2 %
Copper(USD/MT)	6,886	0.7 %	(4.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.1) %	0.5 %

Global Economy: China's industrial profit growth quickened markedly in April, data from the National Bureau of Statistics showed Monday. Industrial profits surged 21.9% year-over-year in April, following the 3.1% increase in March. In the first four months of this year, industrial profits advanced 15% annually compared with an 11.6% jump in the first three months. Producer prices in Japan jumped 0.9% on year in April, the Bank of Japan said. On a monthly basis, producer prices were up 0.1% after climbing 0.5% a month earlier.

Global Equities: Most European stocks reversed intraday gains. Asian stocks edged higher on signs that the United States and North Korea are still working towards holding a summit next month. US markets were shut on Monday in observance of Memorial Day.

Indian Economy: The latest update from India Meteorological Department (IMD), the south-west monsoon is likely to hit the Kerala coast within the next 24 hours. Activities over the coast are favourable for onset of monsoon within the forecast period. The south-west monsoon had advanced into South Andaman Sea, some parts of South Bay of Bengal and Nicobar Islands on 25 May, with enhanced cloudiness and rainfall. According to the IMD monsoon forecast, a low pressure area is developing over east central Bay of Bengal which is gradually moving northwards. There is also an off-shore vortex over Kerala which is also moving northwards.

Equity Markets: Local stocks rose for a third straight session yesterday as a sharp drop in crude prices and a recovery in the rupee boosted sentiment. The Sensex settled well above the psychological 35,000 mark after regaining that level in opening trade. Global oil prices fell near six week low, extending a steep decline in the previous session, as the market eyed an increase in output from the world's three top crude producers, Russia, the United States and Saudi Arabia. The slide in global crude oil prices will help India in containing inflation, current account and fiscal deficits. India imports about 80% of its crude oil requirement.

Corporate News: Infra major Larsen & Toubro reported a 4.69% increase in net profit at Rs 3,167 crore for March quarter. Its consolidated gross revenue for the quarter rose 10 per cent year-on-year (YoY) to Rs 40,678 crore. Local Oil marketing companies and other companies linked to crude oil business could be in continued focus following the latest slide in global crude oil prices. Bank of India reported a net loss of Rs 3,969.27 crore for the March quarter, as asset quality worsened and provisions increased. Net interest income or NII fell 26% to Rs 2,563.85 crore from Rs 3,469 crore in the year-ago period.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(299.9)	(73.4)	(59.1)
MF(INR cr)	759.8	573.5	531.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,259	33,964	33,959
F&O(INR cr)	764,197	797,255	769,202

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.2	13.9	16.2
NSE VIX	13.1	13.6	13.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,614	1.3 %	9.4 %	Energy	13,446	1.0 %	1.2 %
IT	13,498	(1.9) %	6.2 %	Pharma	8,498	2.4 %	(1.4) %
Metals	3,605	1.0 %	1.8 %	Finance	11,015	1.2 %	7.3 %
Auto	11,007	1.1 %	(0.5) %	PSU	3,029	2.7 %	6.1 %
FMCG	28,792	0.7 %	8.6 %	Real Estate	300	1.5 %	1.2 %

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>
Sun Pharma	500	7.1 %	(1.6) %	Tech Mahin	675	(3.9) %	5.5 %
Power Fin.	81	6.6 %	(7.5) %	Cadila Hea	369	(3.3) %	(4.1) %
Punjab Nat	89	6.4 %	(7.9) %	Power Grid	207	(2.4) %	6.2 %
H P C L	313	6.1 %	(9.1) %	HCL Techno	895	(2.3) %	(8.7) %
B P C L	402	5.6 %	(5.1) %	TCS	3,502	(2.3) %	20.4 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Exports (MoM) (APR)	29-05-2018	6:00	CHF	-	0.006
Imports (MoM) (APR)	29-05-2018	6:00	CHF	-	0.039
Swiss Watch Exports (YoY) (APR)	29-05-2018	6:00	CHF	-	0.048
ECB's Lautenschlaeger Speaks at Colloquium in Frankfurt	29-05-2018	15:30	EUR	-	-
ECB's Coeure Speaks at Roundtable Discussion in Paris	29-05-2018	16:00	EUR	-	-
Euro-Zone M3 Money Supply (YoY) (APR)	29-05-2018	8:00	EUR	-	0.037
ECB's Mersch Speaks at Frankfurt Finance Summit	29-05-2018	9:30	EUR	-	-
BRC Shop Price Index (YoY) (MAY)	29-05-2018	23:01	GBP	-	(0.01)
Large Retailers' Sales (APR)	29-05-2018	23:50	JPY	-	0.001
Retail Trade (YoY) (APR)	29-05-2018	23:50	JPY	-	0.01
Retail Trade s.a. (MoM) (APR P)	29-05-2018	23:50	JPY	-	(0.007)
RBNZ Publishes Financial Stability Report	29-05-2018	21:00	NZD	-	-
Building Permits (MoM) (APR)	29-05-2018	22:45	NZD	-	0.147
S&P CoreLogic CS 20-City (MoM) SA (MAR)	29-05-2018	13:00	USD	-	0.0083
S&P/Case-Shiller 20-City Index n.s.a (MAR)	29-05-2018	13:00	USD	-	206.67
S&P/Case-Shiller Composite-20 (YoY) (MAR)	29-05-2018	13:00	USD	-	0.068
S&P/Case-Shiller US Home Price Index (MAR)	29-05-2018	13:00	USD	-	197.01
S&P/Case-Shiller US Home Price Index (YoY) (MAR)	29-05-2018	13:00	USD	-	0.0634
Conf. Board Expectations (MAY)	29-05-2018	14:00	USD	-	108.1
Conf. Board Present Situation (MAY)	29-05-2018	14:00	USD	-	159.6
Consumer Confidence Index (MAY)	29-05-2018	14:00	USD	-	128.7
Dallas Fed Manufacturing Activity (MAY)	29-05-2018	14:30	USD	-	21.8
U.S. to Sell USD40 Bln 4-Week Bills	29-05-2018	15:30	USD	-	-
U.S. to Sell USD42 Bln 6-Month Bills	29-05-2018	15:30	USD	-	-
U.S. to Sell USD48 Bln 3-Month Bills	29-05-2018	15:30	USD	-	-
Fed's Bullard Speaks in Tokyo	29-05-2018	4:40	USD	-	-

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