



29 May.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,914	(0.1) %	2.1 %
BSE SENSEX	39,750	0.2 %	2.1 %
CNX BANK	31,468	(0.4) %	3.8 %
CNX MIDCAP	17,942	(0.3) %	(2.1) %
CNX SMALLCAP	6,633	(0.2) %	(1.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,348	(0.9) %	8.7 %
S&P 500	2,802	(0.8) %	11.8 %
FTSE 100	7,269	(0.1) %	7.9 %
HANG SENG	27,391	0.4 %	9.0 %
NIKKEI	21,260	0.4 %	8.7 %
SHANGHAI COMPOSITE	2,910	0.6 %	18.0 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.39	(0.3) %	(0.1) %
EUR/USD	1.12	0.4 %	(2.2) %
GBP/USD	1.27	0.4 %	(0.4) %
USD/JPY	109.51	(0.4) %	(0.1) %
USD/AUD	1.44	(0.6) %	1.7 %
USD/SGD	1.37	(0.4) %	0.7 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	1.1 %	27.4 %
Gold(INR/10g)	31,710	0.0 %	0.6 %
Gold Comex(USD/oz)	1,280	(0.3) %	(0.9) %
SILVER(INR/1Kg)	36,225	(0.5) %	(5.3) %
Aluminium(USD/MT)	1,773	0.7 %	(4.6) %
Copper(USD/MT)	5,957	0.6 %	2.0 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.4	0.0 %	(0.3) %

**Global Economy:** The US consumer confidence showed substantial improvement in the month of May, according to a report released by the Conference Board on Tuesday. The Conference Board said its consumer confidence index surged up to 134.1 in May after jumping to 129.2 in April. Eurozone economic confidence rose in May, survey data from European Commission showed Tuesday. The economic sentiment index rose unexpectedly to 105.1 in May from revised 103.9 in the previous month. The improvement resulted from higher confidence in industry and services and among consumers. The confidence index in industry rose to -2.9 from -4.3 a month ago. The consumer confidence index improved to -6.5 in May, in line with flash estimate, from -7.3 in April. Another survey from EU showed that the business climate indicator fell marginally to 0.30 in May from 0.42 in April. Eurozone's M3 money supply, a measure of broad money supply, rose 4.7% year-on-year in April after a revised 4.6% increase in March, figures from the European Central Bank showed. The latest pace of growth was the fastest since December 2017, when M3 grew at the same pace. Germany's forward-looking consumer confidence index fell slightly to 10.1 in June from revised 10.2 in May, survey data from the market research group GfK showed. Following a period of stability, the consumer climate was forced to take a small hit once more, GfK said. The economic outlook indicator fell to 1.7 points from 3.0 in April. Japan producer prices were up 0.9% on year in April, the Bank of Japan said, as compared to an increase of 1.1% on year in March. On a monthly basis, producer prices slipped 0.2% after advancing 0.7% a month earlier.

**Global Equities:** European stocks slipped as US-China trade concerns persisted and bond yields rose on worries over high budget deficit in Italy.

**Indian Economy:** The Indian Meteorological Department (IMD) noted in a weather outlook that conditions are likely to become favourable for further advance of Southwest Monsoon into some more parts of South Bay of Bengal, Andaman Islands and north Andaman Sea during next 72 hours. The Confederation of Indian Industry (CII) called for lowering corporate tax rates, maintaining the peak rate of customs duty, kickstarting Government expenditure, and rationalising TDS as well as dispute resolution provisions. Foreign direct investment (FDI) in India dropped for the first time in the last six years in 2018-19, falling by 1% to \$44.37 billion as overseas fund inflows subsided in telecom, pharma and other sectors. According to the latest data of the Department for Promotion of Industry and Internal Trade (DPIIT), FDI in 2017-18 was a record \$44.85 billion.

**Equity Markets:** Local stocks ended with modest gains after a volatile session of trade. Key indices logged gains for third day in a row. The Sensex and the Nifty, both, settled at record high. The Nifty ended above 11,900 mark. IT shares advanced. The barometer index, the S&P BSE Sensex, rose 66.44 points or 0.17% to settle at 39,749.73, a record closing high. The Nifty 50 index rose 4 points or 0.03% to settle at 11,928.75, a record closing high.

**Corporate News:** Mphasis posted an 11.9% increase in consolidated net profit to Rs 266.14 crore in Q4FY19. Its revenue from operations rose 16% to Rs 2,024.95 crore in Q4FY19. Mphasis' net profit was up 28.1% to Rs 1,073.35 crore in FY19. NTPC is eyeing to produce 310 billion units of power and 10.4 million tonne of coal, and spend Rs 20,000 crore on capital expenditure in the current financial year. Sun Pharma reported 52.63% drop in consolidated profit at Rs 635.88 crore for Q4FY19. The company's revenue came in at Rs 7,163.92 crore against Rs 6,977.10 crore.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	56.3	(5.6)	78.5
MF(INR cr)	218.3	385.1	54.1

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	55,773	35,026	35,016
F&O(INR cr)	1,058,883	1,114,280	1,150,700

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.5	16.6	14.7
NSE VIX	15.9	24.4	22.7

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,598	(0.2) %	4.2 %	Energy	16,488	0.6 %	(0.3) %
IT	15,762	1.3 %	(0.5) %	Pharma	8,514	(0.1) %	(9.2) %
Metals	2,993	0.9 %	(3.5) %	Finance	13,447	(0.4) %	7.6 %
Auto	8,398	(0.8) %	(0.2) %	PSU	3,371	(0.7) %	(0.4) %
FMCG	30,069	(0.1) %	(0.4) %	Real Estate	287	0.1 %	7.2 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
NHPC Ltd	25	7.4 %	1.2 %	Bharti Inf	269	(3.8) %	(14.4) %
Zee Entert	382	5.8 %	(11.6) %	Hero Motoc	2,743	(2.8) %	7.2 %
Vodafone I	14	4.6 %	(23.1) %	Grasim Ind	911	(2.6) %	6.3 %
Yes Bank	153	4.1 %	(44.6) %	Bajaj Auto	2,988	(2.6) %	2.5 %
ICICI Lomb	1,155	3.4 %	13.7 %	Biocon	541	(1.8) %	(12.7) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Bank of Canada Rate Decision (MAY 29)	29-05-2019	14:00	CAD	-	0.0175
KOF Leading Indicator (MAY)	29-05-2019	07:00	CHF	-	96.2
Credit Suisse Survey Expectations (MAY)	29-05-2019	08:00	CHF	-	(7.7)
French Gross Domestic Product (QoQ) (1Q F)	29-05-2019	06:45	EUR	-	0.003
French Gross Domestic Product (YoY) (1Q F)	29-05-2019	06:45	EUR	-	0.011
ECB's Mersch Speaks in Frankfurt	29-05-2019	07:30	EUR	-	-
German Unemployment Change (000's) (MAY)	29-05-2019	07:55	EUR	-	-
German Unemployment Claims Rate s.a. (MAY)	29-05-2019	07:55	EUR	-	0.049
Publication of the ECB Financial Stability Review	29-05-2019	08:00	EUR	-	-
BOJ Kuroda speaks in Tokyo	29-05-2019	00:00	JPY	-	-
Foreign Buying Japan Bonds (MAY 24)	29-05-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (MAY 24)	29-05-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (MAY 24)	29-05-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (MAY 24)	29-05-2019	23:50	JPY	-	-
ANZ Activity Outlook (MAY)	29-05-2019	01:00	NZD	-	7.1
ANZ Business Confidence (MAY)	29-05-2019	01:00	NZD	-	(37.5)
RBNZ Governor at Parliament Select Committee on FSR	29-05-2019	01:10	NZD	-	-
Building Permits (MoM) (APR)	29-05-2019	22:45	NZD	-	(0.069)
MBA Mortgage Applications (MAY 24)	29-05-2019	11:00	USD	-	0.024
Richmond Fed Manufact. Index (MAY)	29-05-2019	14:00	USD	-	3
U.S. to Sell USD18 Bln 2-Year Floating Rate Notes Reopening	29-05-2019	15:30	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	29-05-2019	17:00	USD	-	-

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