



30 Apr.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,755	1.0 %	0.7 %
BSE SENSEX	39,067	0.9 %	0.5 %
CNX BANK	30,014	1.5 %	(1.0) %
CNX MIDCAP	17,728	(0.3) %	(3.3) %
CNX SMALLCAP	6,565	(0.1) %	(2.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,554	0.0 %	13.8 %
S&P 500	2,943	0.1 %	17.4 %
FTSE 100	7,441	0.2 %	10.5 %
HANG SENG	29,893	1.0 %	19.0 %
NIKKEI	22,259	(0.2) %	13.8 %
SHANGHAI COMPOSITE	3,063	(0.8) %	24.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.20	0.3 %	1.1 %
EUR/USD	1.11	(0.5) %	(2.7) %
GBP/USD	1.29	(0.3) %	1.2 %
USD/JPY	111.78	(0.1) %	2.0 %
USD/AUD	1.43	0.3 %	0.4 %
USD/SGD	1.36	0.2 %	(0.1) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(4.7) %	34.9 %
Gold(INR/10g)	31,764	(0.1) %	0.7 %
Gold Comex(USD/oz)	1,277	0.0 %	(1.1) %
SILVER(INR/1Kg)	37,532	0.4 %	(1.9) %
Aluminium(USD/MT)	1,832	(1.1) %	(1.4) %
Copper(USD/MT)	6,393	0.3 %	9.5 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.5	(0.0) %	(0.1) %

**Global Economy:** China's Caixin/Markit factory Purchasing Managers' Index for April came in at 50.2, following the March reading of 50.8. The private PMI survey came after China's National Bureau of Statistics released official manufacturing PMI for April, which came in at 50.1. The US economic growth reported a significant acceleration in the first quarter of 2019, according to a report released by the Commerce Department. The real GDP jumped by 3.2% in the first quarter after rising by 2.2% in the fourth quarter of 2018. Profits at China's industrial firms recorded their biggest gains in eight months in March in the latest sign that the economy is stabilising in response to the stimulus. Industrial profits jumped by 13.9% year on year in March to 589.52 billion yuan, rebounding after four months of contraction, the National Bureau of Statistics said. The rebound was driven by growth in production and sales, with rises in prices translating into higher profits. House price inflation in UK cities witnessed its slowest growth since May 2012, according to Hometrack, coming in at 1.7%. The jobless rate in Japan came in at a seasonally adjusted 2.5% in March, rising from 2.3% in February. The retail sales in Japan edged up a seasonally adjusted 0.2% on month in March. This was down from the 0.4% increase in February. On a yearly basis, retail sales rose 1%, rising from 0.6% in the previous month. Industrial output in Japan slipped a seasonally adjusted 0.9% on month in March, the Ministry of Economy, Trade and Industry (METI) said in Friday's preliminary reading. This followed the 0.7% increase in February. On a yearly basis, industrial production tumbled 4.6% following the 1.1% drop in the previous month. Upon the release of the data, the METI downgraded its assessment of industrial output.

**Global Equities:** Momentum was strong on Friday for the US stocks as the S&P 500 and Nasdaq Composite rose to fresh records, boosted by strong GDP figures.

**Indian Economy:** Domestic foreign exchange reserves ended their rising spree for last few weeks. The country's foreign exchange reserves declined by \$739.2 million to \$414.147 billion in the week to April 19, \$414.886 billion. In the reporting week, foreign currency assets, which are a major component of the overall reserves, fell by \$728.6 million to \$386.033 billion.

**Equity Markets:** Key indices logged strong gains on last trading day of the week on strong buying demand in index pivotals. The Sensex regained the psychological 39,000 mark. Sentiments were mostly well supported on steady global cues. The massive correction in global crude oil prices can keep the near term momentum supported for local stocks.

**Corporate News:** The National Company Law Tribunal (NCLT) has ordered liquidation of ABG Shipyard, despite protests from sole bidder Liberty House that claimed its offer for the company exceeded its liquidation value. Yes Bank reported a massive quarterly loss, amplified by provisions against bad loans to an infrastructure conglomerate and an airline. The bank posted a loss of Rs 1,507 crore for the January-March quarter, compared with a profit of Rs 1,180 crore a year earlier. This was the first loss reported by the lender since its 2004 launch. Hero Motocorp said its Q4 net profit fell 24.5% at Rs 730.3 crore versus Rs 967.4 crore, revenue down 7.9% at Rs 7,885 crore versus Rs 8,564 crore, YoY. NTPC is to start commercial operations at its Gadarwala plant w.e.f. April 30. NHPC signs a memorandum of understanding (MoU) with Indian Army for undertaking construction of semi underground bunkers and fully underground caverns at different locations in India



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	551.1	178.2	178.2
MF(INR cr)	(4,562.5)	(363.3)	(363.3)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	34,642	36,184	36,184
F&O(INR cr)	732,838	1,187,292	1,187,292

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.7	12.9	12.9
NSE VIX	21.7	21.0	21.0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,014	1.5 %	(1.0) %	Energy	16,432	1.2 %	(0.6) %
IT	16,504	0.9 %	4.2 %	Pharma	9,462	0.2 %	0.9 %
Metals	3,047	1.9 %	(1.8) %	Finance	12,506	1.3 %	0.1 %
Auto	8,494	(1.1) %	0.9 %	PSU	3,162	1.3 %	(6.6) %
FMCG	30,441	0.2 %	0.8 %	Real Estate	264	(0.5) %	(1.0) %

### 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>
Tata Steel	545	6.8 %	1.9 %	Piramal En	2,404	(5.9) %	(10.8) %
Aurobindo	831	4.5 %	4.9 %	Vodafone I	16	(3.6) %	(8.5) %
SBI Life I	637	3.7 %	6.5 %	P & G Hygi	10,228	(3.5) %	(5.2) %
B P C L	371	3.6 %	(5.3) %	Tata Motor	104	(3.2) %	12.5 %
GAIL (Indi	353	3.0 %	(0.4) %	Tata Motor	216	(2.8) %	15.1 %

### EVENTS CALENDAR

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

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