

Indices	Value	Pts	Chg (%)
SENSEX	33626.97	30.17	0.09
NIFTY	10331.60	6.45	0.06
SGX NIFTY*	10301.50	(32.50)	(0.30)
DOW Jones	23932.76	(572.46)	(2.34)
S&P 500	2604.47	(58.37)	(2.19)
Nasdaq	6915.11	(161.44)	(2.28)
FTSE	7183.64	(15.86)	(0.22)
CAC	5258.24	(18.42)	(0.35)
DAX	12241.27	(63.92)	(0.52)
Shanghai Composite*	3142.58	11.47	0.36
Nikkei*	21693.99	126.47	0.58
Hang Seng*	30363.13	518.19	1.71

\*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10400 CE	2786475	(4.31)
NIFTY	10300 PE	2872050	27.95

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	62.06	(1.48)	(2.33)
Brent Crude (USD)	67.11	(1.22)	(1.79)
Gold (INR)	30694	147.00	0.48
Silver (INR)	38235	9.00	0.02
Copper (INR)	438	(1.70)	(0.39)
Zinc (INR)	211	0.35	0.17
Cotton (INR)	20620	130.00	0.63

Currency	Value	Pts	Chg (%)
USD/Rupee	64.97	0.00	0.00
Euro/Rupee	79.73	0.00	0.00
Pound/Rupee	91.48	0.01	0.01
Euro /USD	1.23	0.00	0.043
Dollar Index	90.10	(0.35)	(0.39)

Volatility	Value	Pts	Chg (%)
CBOE VIX	21.49	2.55	13.46
India VIX	14.74	(0.06)	(0.41)

Interest Rates	Value	Bps change
India 10-Yr Yield	7.16%	(3)
US 10-Yr Yield	2.77%	(6)

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	3336.19	30418.50	1270693.55
Advance (Nos)	1637 (58%)	1096(58%)	NA
Declines (Nos)	1060 (38%)	695 (38%)	NA
Unchanged	116 (4%)	70(4%)	NA

## Market Summary

The market ended on a positive note on Friday. The Market breadth was positive with 4 gainers for every 3 loser on BSE. 1637 shares advanced whereas 1060 shares declined and 116 shares were unchanged on BSE.

BSE Sensex gained 30 points or (0.1%) to close at 33627. Nifty 50 was up 6 points or (0.1%) to settle at 10332. BSE Mid-Cap index advanced 107 points or (0.7%) to settle at 16597. BSE Small-Cap index gained 108 points or (0.6%) to settle at 17883.

Top gainer in BSE Sensex were ICICI Bank (4.7%), Tata Steel (4.0%), Sun Pharma (3.7%), Maruti Suzuki (3.5%) and Adani Ports (3.4%) whereas top loser in BSE were Bharti Airtel (0.1%), Infosys (1.4%), Larsen (1.3%), Bajaj Auto (1.0%) and Axis Bank (0.5%).

US markets closed positive, Dow Jones Industrial Average closed at 23933, declining 572 points (2.3%), S&P 500 was down 58 points (2.2%) to close at 2604 and Nasdaq declined 161 points (2.3%) to close at 6915.

European markets closed positive, FTSE declined 16 points (0.2%) to close at 7184, CAC was down 18 points (0.4%) to close at 5258 and DAX lost 64 points (0.5%) to close at 12241.

## Macro News

- Wind power tariff firmed up further to INR 2.51 per unit in the auction of around 2,000 MW capacities conducted by state-run Solar Energy Corporation of India (SECI), Wind energy tariffs had reversed their downtrend in February auction to quote at INR 2.44/unit against all-time low of INR 2.43/unit in an auction conducted by Gujarat Urja Vikas Nigam Ltd December last year. In the latest SECI auction that ended yesterday, Srijan Energy Systems (250MW), Sprng Energy (300MW), BLP Energy (285), Betam Wind Energy (200), Inox Wind Infrastructure Services (100 MW) and Adani Green Energy (MP) Ltd (300 MW) emerged as successful bidders quoting INR 2.51 per unit, Mytrah Energy (300 MW) and ReNew Wind Energy (TN) Pvt Ltd (300) are also successful bidder in the auction. At present, India has an installed wind capacity of 34 GW. The government has planned to auction 10 GW each in 2018- 19 and 2019-20.

- The export of oilmeals during March 2018 dropped by 56% to 75,393 tons compared to 170,496 tons in March 2017, according to provisional figures released by the Solvent Extractors' Association of India (SEA). However, overall export of oilmeals during FY18 had revived and provisionally reported at 2,839,623 tons compared to 1,885,480 tons during FY17, higher export of rapeseed meal (up by 26%), ricebran extractions (up by 27%) and castorseed meal (up by 51%).

Institutional ActivityCash		
	06-Apr	Apr'2018
<b>FIIs (INRCrs)</b>		
Buy	3927	22332
Sell	4451	23696
<b>Net</b>	<b>(525)</b>	<b>(1364)</b>
<b>DII (INRCrs)</b>		
Buy	3774	18242
Sell	2469	15582
<b>Net</b>	<b>1305</b>	<b>2661</b>

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	1270.26	1477.97	194723	(0.36)
INDEX OPTIONS	54421.58	53480.70	750852	1.56
STOCK FUTURES	8362.53	8421.05	1089034	0.16
STOCK OPTIONS	5048.51	5297.41	61309	19.33
<b>Total</b>	<b>69102.88</b>	<b>68677.13</b>		

Gainers & Losers		
	Price	Chg (%)
<b>Gainers (INR)</b>		
ICICI Bank	280.60	0.97
Sun Pharma	586.35	0.92
Tata Steel	512.40	0.91
Maruti Suzuki	9207.85	0.88
Adani Ports	378.30	0.81
<b>Losers (INR)</b>		
Bharti Airtel	385.40	(2.17)
Infosys	1129.30	(1.37)
Larsen	1311.10	(1.31)
Bajaj Auto	2783.05	(0.98)
Axis Bank	500.70	(0.49)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	17882.99	107.80	0.61
S&P BSE Mid-Cap	16596.57	106.63	0.65
S&P BSE Auto	25409.26	86.11	0.34
S&P BSE BANKEX	27855.60	162.07	0.59
S&P BSE Capital Goods	18799.74	(97.43)	(0.52)
S&P BSE FMCG	10552.42	37.43	0.36
S&P BSE Healthcare	13685.66	127.99	0.94
S&P BSE IT	12233.40	(62.30)	(0.51)
S&P BSE Metals	13631.13	(22.00)	(0.16)
S&P Oil & Gas	14823.03	122.60	0.83

## Key News

### HCL Technologies acquires C3i Solutions for USD 60 million

Software services firm HCL Technologies has acquired C3i Solutions for USD 60 million, a move aimed at accelerating the Indian IT firm's growth in life sciences and consumer services. C3i Solutions is a wholly owned, independently operated subsidiary of Merck & Co, (known as MSD outside the US and Canada). With this acquisition, HCL will complement its broad-based IT and business services capability with the additional depth that C3i has in the life sciences and CPG verticals.

### Dabur completes acquisition of 2 personal care products firms in South Africa

FMCG major Dabur India has completed acquisition of two South Africa-based companies -- D&A Cosmetics Proprietary Ltd and Atlanta Body & Health Products Proprietary Ltd -- through its subsidiary. The company had last year announced that it will acquire the two personal care products companies in South Africa for a total cash consideration of 50 million rands (about INR 25 crore). This is not Dabur's first acquisition in South Africa. In 2016, it had earlier acquired a South Africa-based Discaria Trading (PTY) Ltd.

### HPCL gets environment clearance to set up INR 136 crore LPG plant in Bihar

Hindustan Petroleum Corporation (HPCL) has received the environment clearance for setting up of a new LPG plant with bottling and storage facilities in East Champaran, in the state of Bihar that will entail an investment of INR 136.4 crore. The company will construct mounded storage vessels with a capacity of 1,050 tonnes and bottling capacity of 120 tonnes per annum in an area of 30 acres.

### Cochin Shipyard to set up 42 acre ship repair facility

Cochin Shipyard (CSL) is setting up a 42 acre international ship repair facility at Cochin Port at a cost of INR 970 crore. The facility will be set up at the premises of Cochin Port on land leased from the port. CSL is the first Greenfield and presently the most modern shipbuilding and ship repair yard in India. The company caters to clients engaged in India's defence segment and global commercial shipping sector.

### RCom gets NCLAT's nod for sale of tower, fibre business

Reliance Communications (RCom) has received the National Company Law Appellate Tribunal's (NCLAT) approval to proceed with the sale of its tower and fibre business. Previously, NCLAT had prevented RCom from selling any asset without its permission, following a legal challenge from Swedish telecoms gear maker Ericsson, seeking payment of unpaid dues of INR 11.55 billion by RCom and two of its units.

## International Data

Country	Data	Forecast	Previous
UK	Halifax HPI	0.10%	0.40%

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