

Indices	Value	Pts	Chg (%)
SENSEX	33788.54	161.57	0.48
NIFTY	10379.35	47.75	0.46
SGX NIFTY*	10433.00	40.00	0.38
DOW Jones	23979.10	46.34	0.19
S&P 500	2613.16	8.69	0.33
Nasdaq	6950.34	35.23	0.51
FTSE	7194.75	11.11	0.15
CAC	5263.39	5.15	0.10
DAX	12261.75	20.48	0.17
Shanghai Composite*	3154.26	15.96	0.51
Nikkei*	21833.50	155.24	0.72
Hang Seng*	30580.00	350.42	1.16

\*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10500 CE	3963450	6.26
NIFTY	10300 PE	3243450	12.93

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	63.74	0.32	0.50
Brent Crude (USD)	68.93	0.28	0.41
Gold (INR)	30759	65.00	0.21
Silver (INR)	38545	310.00	0.81
Copper (INR)	442	4.00	0.91
Zinc (INR)	209	(2.45)	(1.16)
Cotton (INR)	20660	40.00	0.19

Currency	Value	Pts	Chg (%)
USD/Rupee	65.02	0.05	0.08
Euro/Rupee	80.01	0.30	0.38
Pound/Rupee	91.94	0.39	0.42
Euro /USD	1.23	(0.00)	(0.05)
Dollar Index	90.00	0.06	0.07

Volatility	Value	Pts	Chg (%)
CBOE VIX	21.77	0.28	1.30
India VIX	14.86	0.11	0.75

Interest Rates	Value	Bps change
India 10-Yr Yield	7.26%	11
US 10-Yr Yield	2.80%	3

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	4498.34	27875.82	489833.65
Advance (Nos)	1662(57%)	1089(57%)	NA
Declines (Nos)	1060 (36%)	708 (36%)	NA
Unchanged	184(6%)	80(6%)	NA

## Market Summary

The market ended on a positive note on Monday. The Market breadth was positive with 3 gainers for every 2 losers on BSE. 1662 shares advanced whereas 1060 shares declined and 184 shares were unchanged on BSE.

BSE Sensex gained 162 points or (0.5%) to close at 33789. Nifty 50 was up 48 points or (0.5%) to settle at 10379. BSE Mid-Cap index advanced 26 points or (0.2%) to settle at 16622. BSE Small-Cap index gained 68 points or (0.4%) to settle at 17951.

Top gainer in BSE Sensex were Axis Bank (3.4%), M&M (2.2%), Indusind Bank (2.1%), ITC (2.1%) and Asian Paints (1.3%) whereas top loser in BSE were Tata Motors (D) (2.1%), Infosys (1.6%), Tata Motors (1.5%), Bharti Airtel (1.2%) and TCS (1.0%).

US markets closed positive, Dow Jones Industrial Average closed at 23979, advancing 46 points (0.2%), S&P 500 was up 9 points (0.3%) to close at 2613 and Nasdaq advanced 35 points (0.5%) to close at 6950.

European markets closed positive, FTSE advanced 11 points (0.2%) to close at 7195, CAC was up 5 points (0.1%) to close at 5263 and DAX gained 20 points (0.2%) to close at 12262.

## Macro News

- Indian mills have exported more than 1.5 lakh bales of cotton to China during last 10 days since the trade war between China and the US broke out. As per Cotton Association of India (CAI). They have contracted between 1.5 lakh bales to 2 lakh bales of exports to China during past 10 days. As soon as the trade restrictions between US and China come into force, Indian cotton trade expects China to shift to India for its cotton requirements

- The United Nations (UN) in its latest report 'the World Economic Situation and Prospects 2018' has said that Indian economy is likely to accelerate from 6.7 per cent in 2017 to 7.2 per cent in 2018 and 7.4 per cent in 2019. The report also indicated that the country's outlook remains largely positive with robust private consumption, public investment and ongoing structural reforms.

- The government has kick started procurement of new wheat crop from farmers and has purchased 19.31 lakh tonnes of the grain in the current marketing year so far, according to the Food Ministry. The government has fixed wheat procurement target at 320 lakh tonnes for 2018-19 marketing year, as against 308 lakh tonnes purchased by state-owned FCI last year.

Institutional ActivityCash	09-Apr	Apr'2018
<b>FII (INRCrs)</b>		
Buy	4447	26780
Sell	5748	29444
<b>Net</b>	<b>(1301)</b>	<b>(2665)</b>
<b>DII (INRCrs)</b>		
Buy	3523	21765
Sell	3164	18746
<b>Net</b>	<b>359</b>	<b>3020</b>

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	1455.17	1687.03	196917	1.13
INDEX OPTIONS	57137.30	55746.17	762209	1.51
STOCK FUTURES	8174.33	8632.45	1094830	0.53
STOCK OPTIONS	5108.52	5120.44	68757	12.15
<b>Total</b>	<b>71875.33</b>	<b>71186.09</b>		

Gainers & Losers	Price	Chg (%)
<b>Gainers (INR)</b>		
Axis Bank	517.90	3.44
M&M	786.00	2.15
IndusInd Bank	1862.25	2.11
ITC	265.95	2.05
Asian Paints	1158.05	1.25
<b>Losers (INR)</b>		
Tata Motors (D)	202.05	(2.11)
Infosys	1110.95	(1.62)
Tata Motors	358.30	(1.53)
Bharti Airtel	380.75	(1.21)
TCS	2921.15	(0.97)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	17951.40	68.41	0.38
S&P BSE Mid-Cap	16622.39	25.82	0.16
S&P BSE Auto	25476.81	67.55	0.27
S&P BSE BANKEX	28106.36	250.76	0.90
S&P BSE Capital Goods	18926.18	126.44	0.67
S&P BSE FMCG	10673.70	121.28	1.15
S&P BSE Healthcare	13649.80	(35.86)	(0.26)
S&P BSE IT	12120.82	(112.58)	(0.92)
S&P BSE Metals	13656.55	25.42	0.19
S&P Oil & Gas	15048.92	225.89	1.52

## Key News

### Rlnfra bags EPC contract worth INR 1,081 crore

Reliance Infrastructure (Rlnfra) has received purchase order of INR 1,081 crore from Nuclear Power Corporation of India (NPCIL) for the prestigious engineering, procurement and construction (EPC) contract for Common Services System, Structure & Components (SSC) package and allied civil works of Unit -3 and 4 of Kudankulam Nuclear Power Project at Tirunelveli District in Tamil Nadu. The contract entails design, engineering, supply, erection, testing and commissioning of SSC package and allied civil works on EPC basis. The project is to be commissioned in 56 months. The contract value is inclusive of taxes and duties and also contains imported component of USD 23.2 million. EPC division of the infrastructure major has won the contract amidst competition from leading EPC players like BHEL, L&T, Tata Projects and BGR.

### ONGC kick-starts USD 5.07 billion KG oil and gas project

Oil and Natural Gas Corp (ONGC) has kick-started its USD 5.07 billion KG oil and gas project by spudding the first of the 34 wells, targeting first gas by end of 2019. The well KDG-A is one of the 34 wells planned under this mega project. The deepwater well has a target depth of 2346 meters, under a water depth of 518 meters. The well is expected to produce around 5000 barrels of oil per day (bopd) when put to production. The project will cumulatively produce around 25 million tonnes of oil and 45 billion cubic meters of gas with peak production of 78,000 barrels per day of oil and 15 million standard cubic meters per day.

### NMDC reports 35.50 MT production of iron ore up to March 2018

NMDC has reported 35.50 million tonnes (MT) of iron ore production and logged sales volume of 36.07 MT up to the month of March 2018. The company's Chhattisgarh mines produced 23.50 MT of iron ore and registered sales volume of 23.16 MT, while Karnataka mines produced 12.00 MT of iron ore and sold 12.91 MT of iron ore up to March 2018.

### L&T Tech Services wins USD 20 million digital contract from ExxonMobil

L&T Technology Services said it had won a digitalization contract with oil & gas giant ExxonMobil Exploration that was valued at more than USD 20 million in its first year. The engineering research and design company said its offerings would help convert historical geoscience content into a digital format, which would help provide geoscientists with improved data availability and improve the speed and efficiency of analysis and evaluation. The company said it would work with L&T Group firm, previously known as L&T Infotech, on the project. The company did not specify the duration of the contract.

## International Data

Country	Data	Forecast	Previous
US	PPI	0.10%	0.20%

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