

Indices	Value	Pts	Chg (%)
SENSEX	34101.13	160.69	0.47
NIFTY	10458.65	41.50	0.40
SGX NIFTY*	10494.50	26.50	0.25
DOW Jones	24483.05	293.60	1.21
S&P 500	2663.99	21.80	0.83
Nasdaq	7140.25	71.22	1.01
FTSE	7258.34	1.20	0.02
CAC	5309.22	31.28	0.59
DAX	12415.01	121.04	0.98
Shanghai Composite*	3167.89	(12.27)	(0.39)
Nikkei*	21789.00	128.72	0.59
Hang Seng*	30798.00	(33.28)	(0.11)

*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10500 CE	4101000	(6.45)
NIFTY	10400 PE	4495350	42.60

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	66.85	(0.22)	(0.33)
Brent Crude (USD)	71.78	(0.24)	(0.33)
Gold (INR)	31002	(353.00)	(1.13)
Silver (INR)	38668	(513.00)	(1.31)
Copper (INR)	442	(6.35)	(1.42)
Zinc (INR)	202	(8.40)	(3.99)
Cotton (INR)	20780	10.00	0.05

Currency	Value	Pts	Chg (%)
USD/Rupee	64.97	(0.05)	(0.07)
Euro/Rupee	80.30	0.25	0.31
Pound/Rupee	92.19	0.29	0.32
Euro /USD	1.23	0.00	0.02
Dollar Index	89.77	0.02	0.02

Volatility	Value	Pts	Chg (%)
CBOE VIX	18.49	(1.75)	(8.65)
India VIX	14.56	0.06	0.41

Interest Rates	Value	Bps change
India 10-Yr Yield	7.49%	3
US 10-Yr Yield	2.82%	4

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	3538.74	29398.17	1358258.17
Advance (Nos)	1116 (40%)	733 (40%)	NA
Declines (Nos)	1563 (55%)	1040 (55%)	NA
Unchanged	138 (5%)	90 (5%)	NA

Market Summary

The market ended on a positive note on Thursday. The Market breadth was negative with 3 gainers for every 4 losers on BSE. 1116 shares advanced whereas 1563 shares declined and 138 shares were unchanged on BSE.

BSE Sensex gained 161 points or (0.5%) to close at 34101. Nifty 50 was up 42 points or (0.4%) to settle at 10459. BSE Mid-Cap index lost 21 points or (0.1%) to settle at 16601. BSE Small-Cap index declined 49 points or (0.3%) to settle at 17935.

Top gainer in BSE Sensex were TCS (4.0%), Infosys (3.4%), Axis Bank (1.6%), ICICI Bank (0.8%) and Tata Motors (D) (0.8%) whereas top loser in BSE were Dr Reddys Labs (2.0%), Tata Steel (1.5%), SBI (1.2%), Sun Pharma (1.1%) and Adani Ports (1.1%).

US markets closed positive, Dow Jones Industrial Average closed at 24483, advancing 294 points (1.2%), S&P 500 was up 22 points (0.8%) to close at 2664 and Nasdaq advanced 71 points (1.0%) to close at 7140.

European markets closed positive, FTSE advanced 1 points (0.0%) to close at 7258, CAC was up 31 points (0.6%) to close at 5309 and DAX gained 121 points (1.0%) to close at 12415.

Macro News

- The government has invited bids from merchant bankers for managing the listing process of two PSUs NEEPCO and MSTC. The government currently holds 89.85 per cent stake in trading firm MSTC and the balance 10.15 per cent is held by the members of the Steel Furnace Association of India and Ispat Industries Ltd. North Eastern Electric Power Corporation Ltd (NEEPCO, which meets about 35 per cent of the energy requirement of the North-East region, is wholly-owned by the government. The listing would entail disinvestment of a portion of paid-up equity of NEEPCO and MSTC through a prospectus based Initial Public Offer (IPO) in the domestic market, the Department of Investment and Public Asset Management (DIPAM) said while inviting bids from merchant bankers.

- Giving major relief to budding entrepreneurs, the government on Thursday allowed startups to avail tax concession only if total investment including funding from angel investors does not exceed INR 100 million. As per a notification by the commerce and industry ministry, an angel investor picking up stakes in a startup should have a minimum net worth of INR 20 million or should have an average returned income of over INR 2.5 million in the preceding three financial years.

Institutional ActivityCash	12-Apr	Apr'2018
FII (INRCrs)		
Buy	4714	36062
Sell	4345	39015
Net	369	(2954)
DII (INRCrs)		
Buy	3263	28294
Sell	3878	24972
Net	(616)	3322

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	2135.10	1819.84	196906	(1.82)
INDEX OPTIONS	104444.72	103678.93	834795	3.44
STOCK FUTURES	8620.26	8375.23	1115127	0.76
STOCK OPTIONS	5954.32	5965.21	88376	7.43
Total	121154.39	119839.21		

Gainers & Losers			
	Price	Chg (%)	
Gainers (INR)			
TCS	3137.30	4.04	
Infosys	1162.25	3.41	
Axis Bank	548.30	1.63	
ICICI Bank	286.45	0.83	
Tata Motors (D)	202.15	0.80	
Losers (INR)			
Dr Reddys Labs	2058.80	(1.97)	
Tata Steel	598.55	(1.51)	
SBI	254.30	(1.17)	
Sun Pharma	514.85	(1.12)	
Adani Ports	373.50	(1.11)	

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	17934.83	(48.63)	(0.27)
S&P BSE Mid-Cap	16600.67	(20.91)	(0.13)
S&P BSE Auto	25440.13	(2.39)	(0.01)
S&P BSE BANKEX	28272.65	99.39	0.35
S&P BSE Capital Goods	19198.69	35.50	0.19
S&P BSE FMCG	10663.18	(16.83)	(0.16)
S&P BSE Healthcare	13603.54	(99.40)	(0.73)
S&P BSE IT	12717.40	391.52	3.18
S&P BSE Metals	13956.37	(199.19)	(1.41)
S&P Oil & Gas	14703.74	(12.13)	(0.08)

Key News

Dosti-Suraksha JV to acquire Jaypee Infra for INR 7,350 crore

Lakshadweep Pvt Ltd., a joint venture formed by two companies promoted by people with ties to billionaire Dilip Shanghvi, is set to acquire Jaypee Infratech, the insolvency-hit developer that has to deliver about 25,000 apartments in Noida and is the operator of the Taj Expressway. The proposed transaction by Lakshadweep, a JV between Suraksha Asset Reconstruction Company and Mumbai-based Dosti Reality, will result in the eventual delisting of Jaypee Infratech as almost all its equity capital will be written off, said two people familiar with the development. The JV has outdone other leading contenders by a huge margin with a INR 7,350 crore bid.

NBCC secures total business worth INR 769.96 crore in March

NBCC (India) has secured the total business of around INR 769.96 crore in the month of March, 2018. The company had secured total Business of around INR 242 crore in the month of February, 2018.

ITI's total order book stands at INR 3671 crore in FY18

ITI's total order book stood at INR 3671 crore in Fiscal Year 2017-18. Besides, the company's total turnover for the period ended March 31, 2018 stood at INR 1701 crore as compared to INR 1621 crore for the previous year ended March 31, 2017. The company has made a net profit of INR 27 crore without grants after a long gap of 16 years.

Capacite Infraprojects bags contract worth of INR 162.67 crore

Capacite Infraprojects has received contract worth INR 162.67 crore (excluding taxes), from Sea View Developers, a Brookfield Investee Company for Civil and Structure work package for construction of Tower 11 and Multi Level Car park.

Aster DM Healthcare enters into agreement with SCDC

Aster DM Healthcare has entered into an agreement with Subramanya Constructions & Development Company (SCDC), a leading real estate developer, to construct a new hospital in Chennai. This 500 bedded, state of the art, multi-specialty hospital is expected to be commissioned in 2020. The hospital, which would be situated at a prime location in Chennai, will provide advanced healthcare services to the residents of Tamil Nadu and customers from other states in India as well as overseas. Aster DM Healthcare, which was recently listed at NSE and BSE already operates 11 hospitals in South India with 4037 installed beds. The new facility is in line with Aster DM's strategy of strengthening its presence in India.

International Data

Country	Data	Forecast	Previous
UK	BOE Gov Carney Speaks	NA	NA

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