

Indices	Value	Pts	Chg (%)
SENSEX	34305.43	112.78	0.33
NIFTY	10528.35	47.75	0.46
SGX NIFTY*	10539.50	(7.50)	(0.07)
DOW Jones	24573.04	212.90	0.87
S&P 500	2677.84	21.54	0.81
Nasdaq	7156.29	49.63	0.70
FTSE	7198.20	(66.36)	(0.91)
CAC	5312.96	(2.06)	(0.04)
DAX	12391.41	(50.99)	(0.41)
Shanghai Composite*	3099.90	(10.75)	(0.35)
Nikkei*	21856.00	20.47	0.09
Hang Seng*	30300.00	(15.59)	(0.05)

\*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10500 CE	3978750	(5.62)
NIFTY	10400 PE	3504150	28.28

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	66.52	0.30	0.45
Brent Crude (USD)	71.65	0.23	0.32
Gold (INR)	31298	180.00	0.58
Silver (INR)	39102	175.00	0.45
Copper (INR)	447	4.20	0.95
Zinc (INR)	205	2.50	1.23
Cotton (INR)	20910	40.00	0.19

Currency	Value	Pts	Chg (%)
USD/Rupee	65.49	0.29	0.44
Euro/Rupee	81.05	0.60	0.75
Pound/Rupee	93.72	0.80	0.86
Euro /USD	1.24	0.00	0.02
Dollar Index	89.43	0.00	0.00

Volatility	Value	Pts	Chg (%)
CBOE VIX	16.56	(0.85)	(4.88)
India VIX	14.26	0.12	0.85

Interest Rates	Value	Bps change
India 10-Yr Yield	7.48%	4
US 10-Yr Yield	2.83%	1

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	2826.81	27753.38	516837.82
Advance (Nos)	1211 (45%)	878 (45%)	NA
Declines (Nos)	1463 (50%)	920 (50%)	NA
Unchanged	202 (5%)	93 (5%)	NA

## Market Summary

The market ended on a positive note on Monday. The Market breadth was negative with 4 gainers for every 5 losers on BSE. 1211 shares advanced whereas 1463 shares declined and 202 shares were unchanged on BSE.

BSE Sensex gained 113 points or (0.3%) to close at 34305. Nifty 50 was up 48 points or (0.5%) to settle at 10528. BSE Mid-Cap index advanced 57 points or (0.3%) to settle at 16734. BSE Small-Cap index gained 100 points or (0.6%) to settle at 18082.

Top gainer in BSE Sensex were Kotak Mahindra (1.9%), Hero Motocorp (1.8%), Bajaj Auto (1.8%), M&M (1.7%) and HDFC (1.6%) whereas top loser in BSE were Tata Motors (5.0%), Tata Motors (D) (4.6%), Infosys (3.1%), Wipro (1.2%) and SBI (0.7%).

US markets closed positive, Dow Jones Industrial Average closed at 24573, advancing 213 points (0.9%), S&P 500 was up 22 points (0.8%) to close at 2678 and Nasdaq advanced 50 points (0.7%) to close at 7156.

European markets closed positive, FTSE declined 66 points (0.9%) to close at 7198, CAC was down 2 points (0.0%) to close at 5313 and DAX lost 51 points (0.4%) to close at 12391.

## Macro News

- In line with easing retail inflation, India's inflation on wholesale level also softened slightly in the month of March, aided by fall in prices of food articles, mainly pulses and vegetables. The wholesale price index (WPI) declined for the fourth straight month. According to the latest data released by the government, WPI stood at 2.47% (provisional) for the month of March, 2018 (over March, 2017) as compared to 2.48% (provisional) for the previous month and 5.11% during the corresponding month of the previous year. Build up inflation rate in the financial year so far was 2.47% compared to a build up rate of 5.11% in the corresponding period of the previous year.

- The power ministry has categorised charging batteries of electric vehicles as a service, a move which will help such stations operate without licence and encourage the use of e-vehicles. Transmission, distribution and trading of electricity need licences under the Electricity Act. Therefore, all utilities have to seek licences for sale of power to consumers. The ministry said in a clarification that during the charging of e-vehicles, a station does not perform any activity related to the transmission, distribution or trading of electricity.

Institutional ActivityCash	14-Apr	Apr'2018
<b>FIIs (INRCrs)</b>		
Buy	3924	44324
Sell	4232	47985
<b>Net</b>	<b>(308)</b>	<b>(3661)</b>
<b>DII (INRCrs)</b>		
Buy	2999	34855
Sell	3028	31258
<b>Net</b>	<b>(29)</b>	<b>3597</b>

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	1535.08	1553.49	214305	4.13
INDEX OPTIONS	61745.73	61561.63	891071	2.27
STOCK FUTURES	8143.62	8105.87	1120706	0.69
STOCK OPTIONS	6535.08	6615.50	94686	(1.09)
<b>Total</b>	<b>77959.52</b>	<b>77836.48</b>		

Gainers & Losers	Price	Chg (%)
<b>Gainers (INR)</b>		
Kotak Mahindra	1170.05	1.88
Hero Motocorp	3798.05	1.84
Bajaj Auto	2839.80	1.81
M&M	801.20	1.66
HDFC	1870.70	1.64
<b>Losers (INR)</b>		
Tata Motors	338.95	(4.96)
Tata Motors (D)	193.50	(4.59)
Infosys	1132.80	(3.10)
Wipro	289.95	(1.16)
SBI	249.30	(0.70)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	18082.25	100.26	0.56
S&P BSE Mid-Cap	16734.31	56.55	0.34
S&P BSE Auto	25537.27	83.69	0.33
S&P BSE BANKEX	28386.31	83.77	0.30
S&P BSE Capital Goods	19219.71	85.04	0.44
S&P BSE FMCG	10733.61	102.30	0.96
S&P BSE Healthcare	13830.94	151.42	1.11
S&P BSE IT	12682.37	(99.25)	(0.78)
S&P BSE Metals	14095.57	(0.37)	(0.00)
S&P Oil & Gas	14645.48	(21.22)	(0.14)

## Key News

### DCB Bank reports 21% rise in Q4 net profit

The bank has reported a rise of 21.47% in its net profit at INR 64.21 crore for the quarter ended March 31, 2018 as compared to INR 52.86 crore for the same quarter in the previous year. Total income of the bank increased by 19.87% at INR 734.05 crore for quarter under review as compared to INR 612.36 crore for the quarter ended March 31, 2017. For the year ended March 31, 2018, the bank has posted a rise of 22.87% in its net profit at INR 245.34 crore as compared to INR 199.68 crore for the same period in the previous year. Total income of the bank increased 17.13% at INR 2723.26 crore for year under review as compared to INR 2324.99 crore for the period ended March 31, 2017.

### Ahluwalia Contracts secures orders worth INR 1,235 crore

Ahluwalia Contracts (India) has secured two new orders from HSCC (India) aggregating to INR 1,235 crore. The first order is for the construction of Hospital and Academic Campus at All India Institute of Medical Science (AIIMS) at Kalyani in the state of West Bengal worth of INR 652 crore and second order is for the construction of Hospital and Academic Campus at AIIMS at Nagpur in the state of Maharashtra worth of INR 583 crore.

### BHEL bags R&M order worth INR 137 crore for ESP Package at Ramagundam STPS

Bharat Heavy Electricals (BHEL) has secured an order for the renovation and modernisation (R&M) of Electrostatic Precipitators (ESP) at Ramagundam Super Thermal Power Station (STPS). Valued at INR 137 crore, the turnkey order envisages carrying out R&M of ESPs of three units of 200 MW each at Ramagundam STPS, Stage-I (3x200 MW) of NTPC. These ESPs have been in operation for more than 25 years.

### SSWL bags another repeat order of 41,000 caravan wheels from Europe

Steel Strips Wheels (SSWL) has bagged another big exports order for supply of steel wheels for EU Caravan market. Order comprises of approximately 41,000 Steel wheels to be shipped from the company's Chennai plant from next month onwards. The company is expected to close some more export orders with another European customers in recent future. This repeat order makes SSWL as a leading supplier of caravan Steel wheels market in European region.

## International Data

Country	Data	Forecast	Previous
US	Building Permits	1.33M	1.30M

SharadAvasthi

Head - Equity Research

sharad.avasthi@spagroupindia.com

Tel.: +91-022-42895600

Ext.206

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