

Indices	Value	Pts	Chg (%)
SENSEX	34450.77	35.19	0.10
NIFTY	10584.70	20.65	0.20
SGX NIFTY*	10596.50	8.50	0.08
DOW Jones	24448.69	(14.25)	(0.06)
S&P 500	2670.29	0.15	0.01
Nasdaq	7128.60	(17.52)	(0.25)
FTSE	7398.87	30.70	0.42
CAC	5438.55	25.73	0.48
DAX	12572.39	31.89	0.25
Shanghai Composite*	3131.52	63.50	2.07
Nikkei*	22261.50	173.46	0.79
Hang Seng*	30598.00	343.60	1.14

*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10600 CE	3254100	(6.80)
NIFTY	10400 PE	5773725	5.05

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	68.92	0.28	0.41
Brent Crude (USD)	74.89	0.18	0.24
Gold (INR)	31277	155.00	0.50
Silver (INR)	39515	(964.00)	(2.38)
Copper (INR)	457	1.85	0.41
Zinc (INR)	215	0.25	0.12
Cotton (INR)	20850	40.00	0.19

Currency	Value	Pts	Chg (%)
USD/Rupee	66.48	0.35	0.53
Euro/Rupee	81.21	(0.13)	(0.16)
Pound/Rupee	92.66	(0.10)	(0.11)
Euro /USD	1.22	0.00	0.00
Dollar Index	91.91	(0.03)	(0.04)

Volatility	Value	Pts	Chg (%)
CBOE VIX	16.34	(0.54)	(3.20)
India VIX	13.14	0.20	1.55

Interest Rates	Value	Bps change
India 10-Yr Yield	7.73%	8
US 10-Yr Yield	2.96%	1

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	3548.89	32294.16	737658.18
Advance (Nos)	1304 (48%)	915 (48%)	NA
Declines (Nos)	1384 (46%)	883 (46%)	NA
Unchanged	159 (6%)	92 (6%)	NA

Market Summary

The market ended on a positive note on Monday. The Market breadth was positive with more than one 1 gainer for every 1 loser on BSE. 1384 shares advanced whereas 1304 shares declined and 159 shares were unchanged on BSE.

BSE Sensex gained 35 points or (0.1%) to close at 34451. Nifty 50 was up 21 point or (0.2%) to settle at 10585. BSE Mid-Cap index advanced 82 points or (0.5%) to settle at 16881. BSE Small-Cap index gained 96 points or (0.5%) to settle at 18274.

Top gainer in BSE Sensex were Indusind Bank (3.4%), M&M (2.7%), Sun Pharma (1.7%), Asian Paints (1.7%) and Yes Bank (1.5%) whereas top loser in BSE were HDFC (1.4%), Coal India (1.0%), HUL (1.0%), ICICI Bank (0.9%) and Tata Motors (0.8%).

US markets closed flat, Dow Jones Industrial Average closed at 24449, declining 14 points (0.1%), S&P 500 closed flat at 2670 and Nasdaq lost 18 points (0.3%) to close at 7129.

European markets closed positive, FTSE advanced 31 points (0.4%) to close at 7399, CAC was up 26 points (0.5%) to close at 5439 and DAX gained 32 points (0.3%) to close at 12572.

Macro News

- India topped the list of recipient of remittances by sending about US \$69 billion back in the financial year which ended on March 31, 2018. There was 9.9% rise in the total remittances as compared to that of last year. Total remittance to low and middle income countries reached USD \$466 billion in the year 2017 which shows 8.5 % increase over USD \$429 billion in 2016. Global remittances to high income countries grew by 7%. Growth in remittances was due to rise in oil prices and strengthening of euro and rubel. Recovery in remittances is driven by Europr, USA and Russia.

- Aviation ministry gave the permission to build a \$1 billion airport in Jewar, on the outskirts of Greater Noida. In the National Capital Region this will be the second civilian airport. This airport will be functional from the year 2021-2022. For buing land and airport construction amount needed is approximately Rs 4000 crore and Rs 3500 crore respectively.

- In association with the IT industry majors the ministry of electronics and IT has launched the Cyber Surakshit Bharat initiative to strengthen cyber security practices and awareness among the government departments. This initiative aims to build strong awareness about cybercrime and to build capacity for safety measures for Chief Information Security Officers (CISO). The founding partners of the Cyber Surakshit Bharat initiative are IT companies like Microsoft, Intel, WIPRO and the knowledge partners are NASSCOM, CISCO, Deloitte etc.

Institutional Activity	23-Apr	Apr'2018
FII (INRCrs)		
Buy	4093	67178
Sell	4352	73611
Net	(259)	(6433)
DII (INRCrs)		
Buy	3299	53435
Sell	2912	47430
Net	387	6005

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	3385.89	3209.33	255589	1.94
INDEX OPTIONS	74105.34	74025.92	934493	1.78
STOCK FUTURES	20012.66	20143.15	1121218	0.08
STOCK OPTIONS	12239.13	12402.07	120082	2.61
Total	109743.02	109780.47		

Gainers & Losers		
	Price	Chg (%)
Gainers (INR)		
Indusind Bank	1875.60	3.40
M&M	822.50	2.74
Sun Pharma	514.20	1.74
Asian Paints	1178.60	1.68
Yes Bank	313.05	1.49
Losers (INR)		
HDFC Bank	1933.05	(1.42)
Coal India	289.20	(0.98)
HUL	1451.25	(0.97)
ICICI Bank	279.55	(0.85)
Tata Motors	333.50	(0.82)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	18274.20	96.17	0.53
S&P BSE Mid-Cap	16881.11	82.17	0.49
S&P BSE Auto	25519.94	83.33	0.33
S&P BSE BANKEX	27923.43	68.06	0.24
S&P BSE Capital Goods	19196.91	5.86	0.03
S&P BSE FMCG	11020.91	(47.57)	(0.43)
S&P BSE Healthcare	14001.58	178.18	1.29
S&P BSE IT	13425.05	89.92	0.67
S&P BSE Metals	14598.92	(133.04)	(0.90)
S&P Oil & Gas	14404.17	70.36	0.49

Key News

Bharti Infratel Q4 profit rose by 1.5%

India's only listed tower company Bharti Infratel reported a sharp rise by 1.5% in net profit in the fiscal fourth quarter. Net profit for January-March is reported to be 606 crore which is higher from 597 crore reported in the year-ago period. Quarterly consolidated revenue rose by 4%. Consolidated revenue for FY18 is reported to rise by 8%. A final dividend of Rs 14 per equity share for FY18 is declared.

PNB MetLife plans for \$ 300 million IPO

PNB MetLife plans for IPO of US \$150-\$300 later this year. Percentage share of Punjab National Bank in PNB MetLife is 74% and that of MetLife International Holdings is 26%.

LIC Housing Finance Q4 net profit rises by 2%

LIC Housing Finance reported 1.9% rise in the net profit in Q4 of the financial year which ended on March 31, 2018. LIC Housing Finance reported profit of Rs 539 crore during this year as against Rs 529 crore in the corresponding quarter in the previous financial year. While the loan growth was 15% but the home loan growth was 11%. Company's net interest income increased by 6%.

Patanjali bids Rs 9000 crore for Ruchi Soya

Ruchi Soya is the largest edible oilseed extraction and refining company in India. It owns popular brands like Nutella, Sunrich, Ruchi Gold etc. On December 31, 2017 Ruchi Soya had a debt load of Rs 12,000 crore. Patanjali Ayurved has reported to put in Rs 9000 crore bid for Ruchi Soya.

International Data

Country	Data	Forecast	Previous
US	Public Sector Net Borrowing	1.1B	(0.3B)

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