

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	10565	0.37	NIFTY IT	13273.45	1.14
Sensex	34427	0.28	NIFTY BANK	25126.15	0.10
DowJones	24665	(0.34)	NIFTY 500	9356.40	0.48
Nasdaq	7238	(0.78)	NIFTY FMCG	28173.20	0.56
Hangseng	30633	(0.25)	NIFTY INFRA	3499.15	1.01
Shanghai	3092	(0.80)	NIFTY AUTO	11431.65	0.17
Nikkei	22199	0.04	NIFTY ENERGY	13643.65	(0.38)
Strait Times	3581	(0.49)	NIFTY PHARMA	8829.75	0.45
Kospi	2477	(0.37)	Advances / Declines	BSE	NSE
Taiwan	10828	(1.30)	Advances	1335	990
FTSE	7329	0.16	Declines	1326	802
CAC	5392	0.21	Unchanged	157	94
DAX	12567	(0.19)	Total	2818	1886

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HINDALCO	264.20	8.81
VEDL	310.45	6.65
TATASTEEL	621.40	3.29
YESBANK	318.50	2.89
BHARTIARTL	394.40	2.64

Nifty Losers		
Company	Price(Rs)	Chg(%)
BPCL	376.40	(7.11)
HINDPETRO	301.65	(5.62)
IOC	158.20	(4.09)
TITAN	952.00	(2.57)
HDFC	1861.00	(0.89)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
UNIPLY	15.32	1.6	10
MAITHANALL	10.55	1.1	10
MERCK	1.04	0.1	9
HSIL	2.01	0.2	9
GILLETTE	0.09	0.0	9

Indian Forex	Closing	Chg	% Chg
USD/INR	65.784	0.102	0.16
GBP/INR	93.419	(0.564)	(0.60)
EUR/INR	81.388	0.087	0.11
JPY/INR	61.220	0.010	0.02

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	31260	(9)
Silver (Rs/1kg)	40200	700

Commodities	Price	% Chg.
Crude (US\$/BBL)	68.4	(0.52)
Brent (US\$/BBL)	73.8	0.04
Gold (US/oz)	1344.5	(0.58)
Silver (US\$/oz)	17.2	(0.06)
Copper (US\$/MT)	6942.0	0.09
Alum (US\$/MT)	2602.5	2.93
Zinc(US\$/MT)	3232.0	1.43

ADR	Cl. Values	% Chg.
ICICI Bank	8.80	(0.60)
HDFC Bank	98.80	(0.60)
Infosys	17.00	0.60
Tata Steel Ltd	17.90	3.00
Dr. Deddy's Labs	32.50	(0.10)
Wipro	5.30	(1.90)
Tata Motors	25.70	(0.50)

Market Sensor

US market fell on Thursday after a major Asian chipmaker delivered a disappointing forecast which dragged the technology sector lower. Investors also fretted over rising interest rates. Dow Jones Industrial Average was down 0.34% or 83.18 points at 24664.89. Nasdaq Composite was down 0.78% or 57.18 points at 7238.06 Standard & Poor's 500 was down 0.57% or 15.51 points at 2693.13

Indian Equity market ended marginally higher in a dull session, indicates consolidation after the recent surge. Reduced geo-political tension and hope of normal monsoon have a positive sentiment in the market though traders seems to be cautious ahead of the release of Reserve Bank of India's latest policy meeting minutes including the TCS result. Nifty ended the previous day with a gain of 0.37% or 39.10 points 10565.30. On Thursday's trading session, FII's sold Rs.624.99 Cr in cash market and bought Rs.1110.94 Cr in derivative segment. Whereas, DII bought net Rs.448.61 Cr in cash segment.

Global News

- ❖ The global economy will race further ahead this year, expanding at its fastest pace since 2010, but trade protectionism has the potential to quickly tire it out, the latest Reuters polls of over 500 economists worldwide suggest.
- ❖ Japan's headline inflation slowed in March from February, highlighting the central bank's struggle to hit its 2 percent price growth target after five years of heavy stimulus, keeping it under pressure to maintain an ultra-easy monetary policy.
- ❖ The biggest danger from the U.S.-China trade dispute is the threat to global confidence and investment, International Monetary Fund Managing Director Christine Lagarde said on Thursday.
- ❖ Bank of Japan Governor Haruhiko Kuroda said the rising tide of protectionism is emerging as a more imminent risk to Japan's economy, issuing his strongest warning to date of the damage trade frictions could inflict on an otherwise solid recovery.
- ❖ Bank of England Governor Mark Carney on Thursday dampened widespread expectations for an interest rate hike in May, pointing out there were also "other meetings" this year.

Economic News

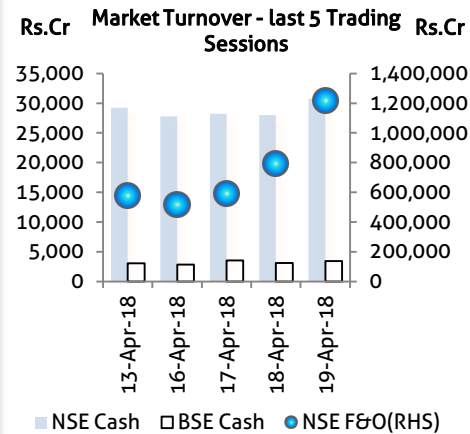
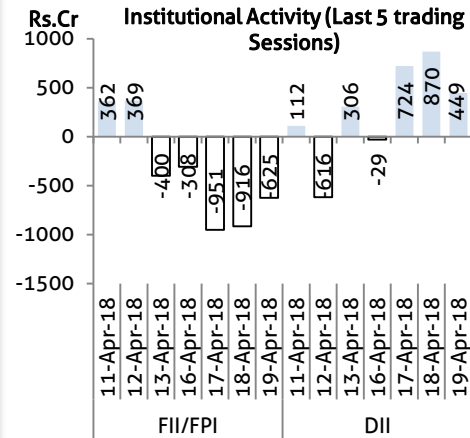
- ❖ The Supreme Court said it was not sure whether bringing people "face to face" with authorities through Aadhaar was the best model as the State should reach them to accord the benefits of the welfare schemes.
- ❖ With cash transactions routed through banks taking a hit due to a cash crunch, the rural economy is at the risk of a slowdown ahead of the monsoon. More so in Uttar Pradesh, Andhra Pradesh, Telangana, Maharashtra and Gujarat.
- ❖ Currency crunch seen in many parts of the country in past few days showed signs of easing with 86 per cent of ATMs coming online, cash being transported to deficit areas and government presses working overtime to print new notes, officials said.
- ❖ India will claim the top spot among the world's fastest-growing major economies this year, but rising trade tensions between the United States and China may restrain that growth, a Reuters poll of economists showed.
- ❖ To shield the crucial information and add an extra level of privacy to Aadhaar against any sort of tampering, the Unique Identification Authority of India (UIDAI) has introduced an updated digitally signed 'QR code' on e-Aadhaar that will now contain the photograph of the Aadhaar user with other non-sensitive details like name, address and birth date.
- ❖ The income tax department has released the ITR forms for income tax return filing for the Financial Year (FY) 2017-18. Even though only the PDF version has been issued, very soon we can expect the excel utility/ schema/ instructions for respective forms so that e-filing can begin.
- ❖ Prime Minister Narendra Modi, who is in the United Kingdom, as part of his 5day three-nation tour, interacted with participants in the 'Bharat Ki Baat, Sabke Sath' programme at Westminster's Central Hall in London.
- ❖ Sebi has written to the government on improving corporate governance standards and creating an autonomous environment at listed PSUs.

Domestic News

- ❖ Fortis Healthcare board has approved evaluation of binding offers from suitors and formed an expert committee to assess the same. This means nonbinding offers will not be considered, a setback for Malaysia's IHH and China's Fosun. They had both submitted nonbinding offers and sought time to conduct due diligence. Two binding offers have been submitted — by TPG-backed Manipal Hospital and the Munjal-Burman family offices.
- ❖ Procter & Gamble Co. will buy a majority stake in Merck Ltd for Rs1,289.88 crore, as part of a global transaction to acquire Merck KGaA's international consumer health business for \$4.2 billion.
- ❖ Parag Milk Foods has acquired the dairy factory of Danone Foods and Beverages India Pvt. Ltd, the local entity of French dairy firm Danone SA. This acquisition will help expand the company's footprint in north India.
- ❖ NTPC has decided to exit the joint venture with BHEL, saying it is not a manufacturer of equipment and would rather concentrate on setting up and operating power plants.
- ❖ NTPC will back down thermal power at some of its units to blend with renewable energy and sell it together.
- ❖ Thomas Cook says Supreme Court restored order passed by Competition Commission of India imposing penalty of Rs 1 crore. The board also approved acquisition of 4.44 percent stake in Travel Corporation (India) for Rs 16.69 crore.

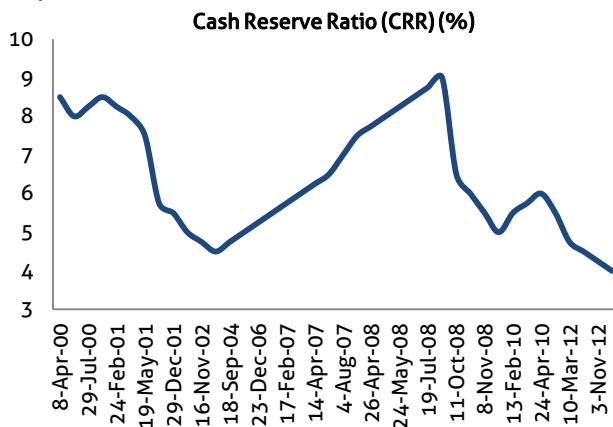
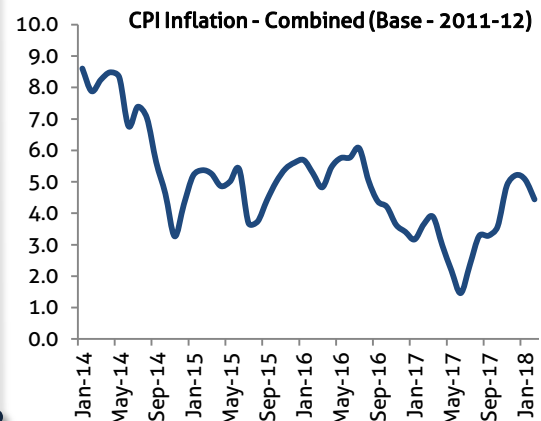
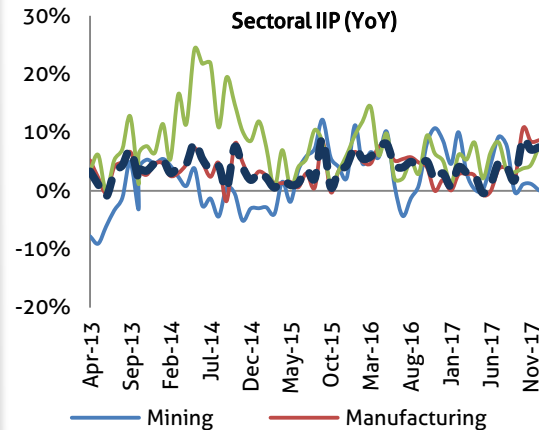
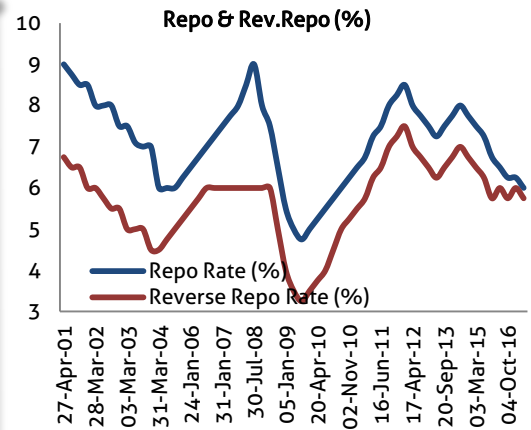
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1256	0.0002	0.02
GBP-USD	1.4076	(0.0009)	0.00
USD-JPY	107.66	0.0028	95.93

Bond Markets	Closing	Chg
10-yr bond	7.76	13.60 bps
Interbank call	5.93	4.40 bps



Domestic News (Cont...)

- ❖ Lasa Supergenerics received WHO-GMP Certificate for unit situated at Mahad.
- ❖ UltraTech Cement's legal counsel raised the company's bid for Binani Cement by Rs500 crore, while reaffirming the AV Birla Group company's Rs7,960 crore bid in the event of NCLT ordering liquidation of the beleaguered cement maker.
- ❖ The Aditya Birla Group will sell a minority stake of anywhere between 15 per cent and 20 per cent in its Idea Payments Bank to raise about Rs 200 crore, seeking a valuation of Rs 1,000 crore, will use the money to expand its operations.
- ❖ JB Chemicals gets orders from pollution control board directing closure of formulation unit at Daman
- ❖ Liberty House UK moves NCLT to challenge resolution professional's decision in ABG Shipyard.
- ❖ Lanco Infratech clarified on news article that neither resolution panel nor committee of creditors (COC) have taken decision for liquidation
- ❖ TCS is more confident about BFSI revenues from North America as client discussions show there is "not much stress left in the system," and this could potentially translate into better client spending through the course of the year. Its board recommended a 1:1 bonus share issue.
- ❖ In a major victory for Numetal and ArcelorMittal, the Ahmedabad bench of the NCLT lenders and the resolution professional of the bankrupt Essar Steel to reconsider their first bids.
- ❖ Entities having sufficient net-worth and the ability to run Air India can bid for 76 per cent stake in the national carrier, DIPAM Secretary Neeraj Gupta said.
- ❖ Thyssenkrupp AG will take till the end of the year to set up its joint venture with Tata Steel UK Ltd, about six months later than it had earlier indicated, as negotiations are taking longer than estimated.
- ❖ CCI imposed a total fine of Rs215 crore on Eveready, Indo National, industry grouping AIDCM and their officials for cartelisation in pricing of zinc-carbon dry cell batteries.
- ❖ GMR Infra is seeking to restructure a portion of its Rs 4,000-crore debt liability as the Bengaluru-based infrastructure firm seeks flexibility in balance sheet to meet future capital requirements of its businesses.



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Apr-18	Sundaram Finance Hold Ltd	RELIANCE MUTUAL FUND	BUY	3000000	151.7
19-Apr-18	Kwality Limited	U A ENTERPRISES PRIVATE LIMITED	SELL	1262775	55.0
19-Apr-18	Jaypee Infratech Ltd	JMP SECURITIES PVT LTD	SELL	9548360	7.0
19-Apr-18	Cerebra Int Tech Ltd	HASMUKHRAI LALUBHAI MEHTA	BUY	906784	69.8
19-Apr-18	Sumeet Ind Limited	AMARKUMAR ODHAVJI DHAMECHA	SELL	1169101	17.4

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Apr-18	HATHWAY	MORGAN STANLEY ASIA SINGAPORE PTE	S	17,954,380	39.5
19-Apr-18	UNIPLY	KESHAV KANTAMNENI	S	1,450,000	411.0
19-Apr-18	MAITHANALL	SUDHANSHU AGARWALLA	B	559,200	900.0
19-Apr-18	GARNETINT	BALRAM CHAINRAI	S	330,000	200.0
19-Apr-18	JYOTI	FINQUEST FINANCIAL SOLUTIONS PVT. LTD.	B	925,257	68.3

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
539620	AINFRA	20-Apr-18	Bonus issue 1:1	23-Apr-18
539620	AINFRA	20-Apr-18	Stock Split From Rs.10/- to Rs.5/-	23-Apr-18
511288	GRUH	23-Apr-18	Dividend - Rs. - 3.3000	-
504959	STOVAC	24-Apr-18	Final Dividend - Rs. - 36.0000	-
500870	CASTROLIND	25-Apr-18	Final Dividend - Rs. - 2.5000	-
538595	GLOSTER	25-Apr-18	Amalgamation	26-Apr-18
532819	MINDTREE	25-Apr-18	Interim Dividend - Rs. - 2.0000	26-Apr-18
534309	NBCC	25-Apr-18	Stock Split From Rs.2/- to Rs.1/-	26-Apr-18
509820	PAPERPROD	25-Apr-18	Dividend - Rs. - 3.0000	-
506373	CITURGIA	26-Apr-18	Stock Split From Rs.10/- to Rs.2/-	30-Apr-18
500123	ELANTAS	26-Apr-18	Dividend - Rs. - 4.5000	-
539686	KPEL	26-Apr-18	Bonus issue 3:10	01-May-18
500674	SANOFI	26-Apr-18	Final Dividend - Rs. - 53.0000	-
539428	TEJNAKSH	26-Apr-18	Bonus issue 36:10	28-Apr-18
500002	ABB	27-Apr-18	Dividend - Rs. - 4.4000	-
540565	INDIGRID	27-Apr-18	Income Distribution (InvIT)	02-May-18
507488	GMBREW	02-May-18	Dividend - Rs. - 3.0000	-
509496	ITDCM	02-May-18	Dividend - Rs. - 0.4000	-
500092	CRISIL	03-May-18	Interim Dividend - Rs. - 6.0000	04-May-18
500339	RAIN	03-May-18	Final Dividend - Rs. - 1.0000	-
507912	LKPFIN	07-May-18	Dividend - Rs. - 3.0000	-
532281	HCLTECH	09-May-18	Dividend - Rs. - 0.4000	10-May-18

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
16-Apr-18	GBP	Rightmove House Price Index (MoM)			1.50%
16-Apr-18	USD	NY Empire State Manufacturing Index (Apr)		18.6	22.5
16-Apr-18	USD	Retail Sales (MoM) (Mar)		0.40%	-0.10%
16-Apr-18	USD	Business Inventories (MoM) (Feb)		0.60%	0.60%
16-Apr-18	USD	NAHB Housing Market Index (Apr)		70	70
17-Apr-18	USD	TIC Net Long-Term Transactions (Feb)			62.1B
17-Apr-18	CNY	GDP (YoY) (Q1)		6.70%	6.80%
17-Apr-18	CNY	Industrial Production (YoY) (Mar)		6.20%	7.20%
17-Apr-18	CNY	Retail Sales (YoY) (Mar)		9.90%	9.70%
17-Apr-18	JPY	Industrial Production (MoM) (Feb)			4.10%
17-Apr-18	GBP	Claimant Count Change (Mar)		5.0K	9.2K
17-Apr-18	GBP	Unemployment Rate (Feb)		4.30%	4.30%
17-Apr-18	USD	Building Permits (Mar)		1.328M	1.321M
17-Apr-18	USD	Housing Starts (Mar)		1.269M	1.236M
17-Apr-18	USD	Industrial Production (MoM) (Mar)		0.30%	0.90%
18-Apr-18	JPY	Trade Balance (Mar)		498B	3B
18-Apr-18	GBP	CPI (YoY) (Mar)		2.70%	2.70%
18-Apr-18	GBP	PPI Input (YoY) (Mar)		4.10%	3.40%
18-Apr-18	GBP	PPI Output (YoY) (Mar)		2.40%	2.60%
18-Apr-18	GBP	RPI (YoY) (Mar)		3.60%	3.60%
18-Apr-18	EUR	CPI (YoY) (Mar)		1.40%	1.40%
18-Apr-18	USD	MBA 30-Year Mortgage Rate			4.66%
19-Apr-18	EUR	Current Account n.s.a. (Feb)			12.8B
19-Apr-18	GBP	Retail Sales (YoY) (Mar)		2.00%	1.50%
19-Apr-18	USD	Initial Jobless Claims		230K	233K
19-Apr-18	USD	Philadelphia Fed Manufacturing Index (Apr)		20	22.3
20-Apr-18	JPY	National Core CPI (YoY) (Mar)		0.90%	1.00%
20-Apr-18	EUR	Consumer Confidence (Apr)		-0.3	0.1

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
16-Apr-18	INR	WPI Inflation (YoY) (Mar)		2.58%	2.48%

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