



01 Nov.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,442	0.5 %	2.3 %
BSE SENSEX	34,442	1.6 %	4.2 %
CNX BANK	25,285	0.5 %	3.9 %
CNX MIDCAP	17,257	0.4 %	(9.6) %
CNX SMALLCAP	6,092	0.5 %	(23.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,116	1.0 %	1.2 %
S&P 500	2,712	1.1 %	0.6 %
FTSE 100	7,128	1.3 %	(6.8) %
HANG SENG	24,980	1.6 %	(18.1) %
NIKKEI	21,920	2.2 %	(6.7) %
SHANGHAI COMPOSITE	2,603	1.4 %	(22.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.95	0.7 %	16.1 %
EUR/USD	1.13	(0.4) %	(5.6) %
GBP/USD	1.28	0.3 %	(4.9) %
USD/JPY	112.86	0.3 %	0.1 %
USD/AUD	1.41	(0.6) %	10.0 %
USD/SGD	1.38	(0.0) %	3.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(1.3) %	8.2 %
Gold(INR/10g)	31,735	0.1 %	8.1 %
Gold Comex(USD/oz)	1,219	(0.2) %	(6.9) %
SILVER(INR/1Kg)	37,890	(0.0) %	(1.8) %
Aluminium(USD/MT)	1,946	(0.3) %	(13.7) %
Copper(USD/MT)	6,073	(1.0) %	(15.4) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	0.0 %	0.7 %

**Global Economy:** UK consumer confidence index dropped to -10 in October from -9 in September, market research firm GfK reportedly said Wednesday. The reading came in line with expectations. Consumers were more concerned about economic situation over the coming twelve months. Germany's retail sales edged up a calendar and seasonally adjusted 0.1% in September from August, when sales fell 0.3%, revised from 0.1%, preliminary data from the Federal Statistical Office showed. On a year-on-year basis, retail sales fell 2.6% from a year ago. The Bank of Japan policy board decided to purchase government bonds so that the yield of 10-year JGBs will remain at around zero percent. The board retained the -0.1% interest rate on current accounts that financial institutions maintain at the bank. The BoJ will conduct purchases of Japanese government bonds in a flexible manner so that the outstanding amount will increase at an annual pace of about JPY 80 trillion. For the fiscal 2018, real growth projection was trimmed to 1.4% from 1.5% and inflation forecast to 0.9% from 1.1%.

**Global Equities:** Signs of recovery stayed in place for global stock markets after the recent turmoil on the last trading day of October 2018.

**Indian Economy:** Growth of eight infrastructure sectors slowed down to 4.3% in September, the lowest in the last four months, as production of crude oil and natural gas dropped. The autonomy for the Central Bank, within the framework of the RBI Act, is an essential and accepted governance requirement, noted a government press release. Governments in India have nurtured and respected this. Both the Government and the Central Bank, in their functioning, have to be guided by public interest and the requirements of the Indian economy. For the purpose, extensive consultations on several issues take place between the Government and the RBI from time to time.

**Equity Markets:** Local stocks scored strong gains led by index heavyweights HDFC and Infosys. The barometer index, the S&P BSE Sensex, surged 550.92 points or 1.63% to settle at 34,442.05. The Nifty 50 index gained 188.20 points or 1.85% to settle at 10,386.60. The market rally was triggered after the government clarified on tussle with the Reserve Bank of India and said that it respects and nurtures central bank's autonomy. Positive global cues also boosted sentiment.

**Corporate News:** Tata Group shares could be in focus today after media reports stated that the sacking of Cyrus Mistry as the chairman and director, respectively, of Tata Sons and TCS violated provisions of the Companies Act, RBI rules and Tatas' own articles of association, according to the Registrar of Companies. Tata Motors recorded a loss of Rs 1,048.80 crore for quarter ended September 30. The firm had posted a profit of Rs 2,482.78 crore in the corresponding quarter last year. Larsen & Toubro on reported better-than-expected financial results. The infra major reported a 22.53% year-on-year rise in profit at Rs 2,230 crore in Q2FY19 over Rs 1,819.88 crore in Q2FY18.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(208.8)	(184.9)	(54.6)
MF(INR cr)	1,310.9	1,095.2	500.1

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	44,719	38,665	35,475
F&O(INR cr)	1,053,926	1,068,251	971,523

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	23.4	19.7	14.9
NSE VIX	19.8	19.2	14.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,153	1.4 %	3.4 %	Energy	13,753	0.7 %	3.5 %
IT	14,940	4.1 %	17.6 %	Pharma	9,758	2.3 %	13.2 %
Metals	3,297	(1.1) %	(6.9) %	Finance	10,640	2.3 %	3.7 %
Auto	8,821	0.9 %	(20.2) %	PSU	2,916	2.4 %	2.2 %
FMCG	28,547	1.0 %	7.7 %	Real Estate	215	0.7 %	(27.5) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tech Mahin	744	8.6 %	16.2 %	Hind.Zinc	262	(8.6) %	(13.5) %
Indiabulls	835	8.5 %	(32.9) %	Coal India	266	(3.5) %	(4.1) %
Piramal En	2,173	7.9 %	(12.1) %	Dabur Indi	385	(2.9) %	14.5 %
UPL	674	5.9 %	(10.4) %	Dr Reddy's	2,542	(2.0) %	19.2 %
A B B	1,279	5.9 %	(1.1) %	Tata Steel	554	(1.9) %	(4.3) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Export Price Index (QoQ) (3Q)	01-11-2018	0:30	AUD	-	-
Import price index (QoQ) (3Q)	01-11-2018	0:30	AUD	-	-
Trade Balance (SEP)	01-11-2018	0:30	AUD	-	A\$1604m
Commodity Index AUD (OCT)	01-11-2018	5:30	AUD	-	-
RBA Commodity Index SDR (YoY) (OCT)	01-11-2018	5:30	AUD	-	-
MLI Leading Indicator (MoM) (SEP)	01-11-2018	12:30	CAD	-	-
RBC Canadian Manufacturing PMI (OCT)	01-11-2018	13:30	CAD	-	-
SECO Consumer Confidence (OCT)	01-11-2018	6:45	CHF	-	-
Consumer Price Index (MoM) (OCT)	01-11-2018	8:15	CHF	-	-
Consumer Price Index (YoY) (OCT)	01-11-2018	8:15	CHF	-	-
Consumer Price Index Core (YoY) (OCT)	01-11-2018	8:15	CHF	-	-
Consumer Price Index EU Harmonized (MoM) (OCT)	01-11-2018	8:15	CHF	-	-
Consumer Price Index EU Harmonized (YoY) (OCT)	01-11-2018	8:15	CHF	-	-
PMI Manufacturing (OCT)	01-11-2018	8:30	CHF	-	-
Caixin China PMI Mfg (OCT)	01-11-2018	1:45	CNY	-	-
Bank of England Bank Rate (NOV 1)	01-11-2018	12:00	GBP	-	-
Bank of England Inflation Report	01-11-2018	12:00	GBP	-	-
BOE Asset Purchase Target (NOV)	01-11-2018	12:00	GBP	-	435b
BOE Corporate Bond Target (NOV)	01-11-2018	12:00	GBP	-	10b
BOE's Carney speaks at press conference in London	01-11-2018	12:30	GBP	-	-
Nationwide House PX (MoM) (OCT)	01-11-2018	7:00	GBP	-	-
Nationwide House Px n.s.a. (YoY) (OCT)	01-11-2018	7:00	GBP	-	-
Markit UK PMI Manufacturing s.a. (OCT)	01-11-2018	9:30	GBP	-	-
Nikkei Japan PMI Manufacturing (OCT F)	01-11-2018	0:30	JPY	-	-
Monetary Base (YoY) (OCT)	01-11-2018	23:50	JPY	-	-
Monetary Base End of period (OCT)	01-11-2018	23:50	JPY	-	□505.0t
Vehicle Sales (YoY) (OCT)	01-11-2018	5:00	JPY	-	-
Markit Mexico PMI Mfg (OCT)	01-11-2018	15:30	MXN	-	-
ANZ Consumer Confidence (MoM) (OCT)	01-11-2018	21:00	NZD	-	-



ANZ Consumer Confidence Index (OCT)	01-11-2018	21:00	NZD	-	-
Challenger Job Cuts (YoY) (OCT)	01-11-2018	11:30	USD	-	-
Continuing Claims (OCT 2)	01-11-2018	12:30	USD	-	1636k
Initial Jobless Claims (OCT 27)	01-11-2018	12:30	USD	-	215k
Nonfarm Productivity (3Q P)	01-11-2018	12:30	USD	-	-
Unit Labor Costs (3Q P)	01-11-2018	12:30	USD	-	-
Markit US Manufacturing PMI (OCT F)	01-11-2018	13:45	USD	-	-
Construction Spending (MoM) (SEP)	01-11-2018	14:00	USD	-	-
ISM Employment (OCT)	01-11-2018	14:00	USD	-	-
ISM Manufacturing (OCT)	01-11-2018	14:00	USD	-	-
ISM New Orders (OCT)	01-11-2018	14:00	USD	-	-
ISM Prices Paid (OCT)	01-11-2018	14:00	USD	-	-
EIA Natural Gas Storage Change (OCT 26)	01-11-2018	14:30	USD	-	-
EIA Working Natural Gas Implied Flow (OCT 26)	01-11-2018	14:30	USD	-	-

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