



01 Nov.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|----------|
| CNX NIFTY | 11,887 | 0.1 % | 1.9 % |
| BSE SENSEX | 40,129 | 0.2 % | 3.3 % |
| CNX BANK | 30,196 | 0.4 % | (0.4) % |
| CNX MIDCAP | 16,845 | 0.2 % | (8.1) % |
| CNX SMALLCAP | 5,774 | 0.5 % | (14.3) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 27,046 | (0.5) % | 15.9 % |
| S&P 500 | 3,038 | (0.3) % | 21.2 % |
| FTSE 100 | 7,248 | (1.1) % | 7.6 % |
| HANG SENG | 26,907 | 0.9 % | 7.1 % |
| NIKKEI | 22,927 | 0.4 % | 17.2 % |
| SHANGHAI COMPOSITE | 2,929 | (0.4) % | 18.8 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.67 | 0.3 % | 1.8 % |
| EUR/USD | 1.11 | 0.3 % | (2.9) % |
| GBP/USD | 1.29 | 0.3 % | 1.1 % |
| USD/JPY | 108.87 | 0.0 % | (0.7) % |
| USD/AUD | 1.46 | (0.6) % | 2.4 % |
| USD/SGD | 1.36 | (0.0) % | (0.2) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 55 | 0.0 % | 18.3 % |
| Gold(INR/10g) | 38,650 | 0.1 % | 22.6 % |
| Gold Comex(USD/oz) | 1,513 | 0.8 % | 17.2 % |
| SILVER(INR/1Kg) | 46,749 | (0.2) % | 22.2 % |
| Aluminium(USD/MT) | 1,743 | (0.2) % | (6.2) % |
| Copper(USD/MT) | 5,825 | (1.0) % | (0.2) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec US 10 | 1.7 | (0.1) % | (0.9) % |

Global Economy: Chicago business barometer fell to 43.2 in October from 47.1 in September, with a reading below 50 indicating a contraction in regional manufacturing activity. This is nearly a four year low. China's non-manufacturing Purchasing Managers' Index came in at 52.8 in October, down from 53.7 in September, official survey results from the National Bureau of Statistics showed Thursday. A reading above 50 indicates expansion in the sector. The manufacturing PMI fell to 49.3 in October from 49.8 a month ago. The sector has been contracting since May and the reading was the lowest since last February. China's composite output index that covers manufacturing, services and construction, declined to 52.0 in October from 53.1 in the previous month. Euro area economy grew marginally in the third quarter, preliminary flash estimate from Eurostat showed Thursday. Gross domestic product expanded 0.2% sequentially, the same rate as seen in the second quarter. On a yearly basis, GDP advanced 1.1%, slightly slower than the 1.2% growth posted a quarter ago. Euro area jobless rate held steady at the lowest since July 2008. The unemployment rate came in at 7.5% in September, unchanged from August. Germany retail sales grew at a faster pace in September, driven by non-food product sales, data from Destatis revealed Thursday. Turnover in retail trade increased 3.4% year-on-year in September, following a 3.1% rise in August. Bank of Japan maintained its policy rates on Thursday but it signaled further monetary easing going forward. The Policy Board of the BoJ voted 7-2 to maintain interest rate at -0.1% on current accounts that financial institutions maintain at the bank.

Global Equities: US stocks came off record highs as renewed uncertainty about the potential for a long-term US-China trade deal hurt the sentiments.

Indian Economy: India's fiscal deficit has widened in the first half of the current fiscal year. The fiscal deficit stood at Rs 6.51 lakh crore till September-end 2019, compared to Rs 5.95 lakh crore in the same period of the previous fiscal year. The half year's fiscal deficit is equivalent to 92.6% of the government's budget estimate for the complete year, which was 95.3% in HY 19. Output of core infrastructure industries shrank by 5.2% in September 2019 as seven of eight sectors witnessed negative growth. According to RBI's data on sectoral deployment of bank credit collected from select 39 scheduled commercial banks, on a year-on-year (y-o-y) basis, non-food bank credit growth decelerated to 8.1% in September 2019 from 11.3% in September 2018. India's gold market is one of the largest in the world, but it lacks organisation, structure and trust. But that is beginning to change with numerous transformational initiatives underway. A robust bullion banking industry could support and accelerate that shift - inspiring trust, bolstering innovation and driving growth, the World Gold Council noted in a latest update. Indian commercial banks are ready to embrace bullion as an asset class.

Equity Markets: Local market ended with decent gains on Thursday, supported by banks and IT stocks. The barometer index, the BSE Sensex rose 77.18 points or 0.19% to 40,129.05, as per the provisional closing data. The Nifty 50 index rose 37.1 points or 0.31% to 11,881.20, as per the provisional closing data. Steep volatility was witnessed on account of monthly expiry of F&O contracts. The Sensex pared gains after hitting a fresh record high of 40,392.22 in intraday today. Market sentiment was boosted as data showed that foreign institutional investors were net buyers of Indian stocks.

Corporate News: Auto stocks will be in focus as these companies will declare their October monthly sales. Jindal Saw reported 209.78% rise in consolidated net profit to Rs 301.04 crore on 9.53% fall in total income to Rs 2710.97 crore in Q2 September 2019 over Q2 September 2018. Blue Dart Express reported 35.02% fall in consolidated net profit to Rs 14.64 crore on 0.45% rise in total income to Rs 808.69 crore in Q2 September 2019 over Q2 September 2018. Laurus Labs reported 248.86% rise in consolidated net profit to Rs 56.55 crore on 19.2% rise in total income to Rs 713.78 crore in Q2 September 2019 over Q2 September 2018.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 1,069.8 | 89.8 | 21.9 |
| MF(INR cr) | 60.9 | 286.3 | 395.4 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 53,857 | 38,862 | 35,860 |
| F&O(INR cr) | 2,620,756 | 1,471,705 | 1,347,157 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0 | 17.4 | 15.8 |
| NSE VIX | 16.3 | 16.7 | 17.3 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 30,066 | 0.3 % | (0.9) % | Energy | 16,486 | 0.1 % | (0.3) % |
| IT | 15,559 | 1.1 % | (1.8) % | Pharma | 7,878 | 0.8 % | (16.0) % |
| Metals | 2,501 | (0.5) % | (19.4) % | Finance | 13,516 | (0.2) % | 8.1 % |
| Auto | 8,450 | 0.2 % | 0.4 % | PSU | 2,506 | 3.8 % | (26.0) % |
| FMCG | 32,320 | 0.1 % | 7.0 % | Real Estate | 269 | 1.2 % | 0.7 % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Yes Bank | 70 | 23.9 % | (74.5) % | Interglobe | 1,457 | (3.7) % | 2.8 % |
| Zee Entert | 261 | 10.8 % | (39.6) % | Indiabulls | 207 | (3.5) % | (75.6) % |
| St Bk of I | 312 | 7.8 % | (3.2) % | JSW Steel | 228 | (2.7) % | (22.0) % |
| Berger Pai | 527 | 5.8 % | 59.7 % | General In | 311 | (2.0) % | 26.4 % |
| Page Indus | 25,751 | 4.7 % | 0.9 % | Tech Mahin | 739 | (2.0) % | (5.9) % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

..... End of Report