



02 Nov.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,380	0.0 %	1.7 %
BSE SENSEX	34,432	(0.0) %	4.5 %
CNX BANK	25,324	0.0 %	4.1 %
CNX MIDCAP	17,339	0.0 %	(9.2) %
CNX SMALLCAP	6,162	0.0 %	(22.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,381	1.1 %	2.2 %
S&P 500	2,740	1.1 %	1.7 %
FTSE 100	7,115	(0.2) %	(7.0) %
HANG SENG	25,416	1.8 %	(16.7) %
NIKKEI	21,688	(1.1) %	(7.7) %
SHANGHAI COMPOSITE	2,606	0.1 %	(22.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.45	(0.3) %	15.4 %
EUR/USD	1.14	0.4 %	(5.1) %
GBP/USD	1.30	2.2 %	(3.9) %
USD/JPY	112.75	(0.4) %	0.0 %
USD/AUD	1.39	(1.5) %	8.7 %
USD/SGD	1.38	(0.6) %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(1.3) %	8.2 %
Gold(INR/10g)	31,697	(0.1) %	8.0 %
Gold Comex(USD/oz)	1,219	(0.2) %	(6.9) %
SILVER(INR/1Kg)	37,884	(0.0) %	(1.9) %
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: The ISM said its Purchasing Managers Index or PMI for US dropped to 57.7 in October from 59.8 in September, although a reading above 50 still indicates growth in the manufacturing sector. With the much bigger than expected decrease, the manufacturing index fell to its lowest level since hitting 57.3 in April. The Caixin China manufacturing PMI edged up to 50.1 in October from 50.0 in September, Caixin Media Co. and research firm Markit said Thursday. UK manufacturing PMI fell to a 27-month low of 51.1 in October from revised 53.6 in September. New orders declined in October on lower new work from overseas and softer growth of domestic demand. The manufacturing sector in Australia continued to expand in October, albeit at a slightly slower rate, the latest survey from the Australian Industry Group revealed with a PMI score of 58.3, down from 59.0 in previous month.

Global Equities: Sentiments remained supported on the first day of November after a roller coaster ride in last month is slowly turning around.

Indian Economy: India's factory production edged up in October as companies scaled up production and employment levels amid strong rise in business order flows. Nikkei India Manufacturing Purchasing Managers' Index (PMI) rose to 53.1 in October from 52.2 in September. This is the 15th month of continuous expansion. The survey is conducted among purchasing executives across over 400 companies. The ongoing improvements in demand, coupled with technological advancements and favourable market conditions, prompted a stronger upswing in production. The rate of output growth was the second-highest registered in the year-to-date, with accelerations evident in consumer, intermediate and investment goods sectors.

Equity Markets: A choppy session was seen yesterday. Key equity indices settled with minor losses after seeing wild swings either ways. The barometer index, the S&P BSE Sensex, fell 10.08 points or 0.03% to settle at 34,431.97. The Nifty 50 index fell 6.15 points or 0.06% to settle at 10,380.45. IT shares dropped on firm rupee.

Corporate News: Hindustan Petroleum Corporation (HPCL) reported 37.05% fall in net profit to Rs 1091.98 crore on 41.4% rise in total income to Rs 67931.38 crore in Q2 September 2018 over Q2 September 2017. GlaxoSmithkline Consumer Healthcare reported 43.18% rise in net profit to Rs 275.49 crore on 16.41% rise in total income to Rs 1361 crore in Q2 September 2018 over Q2 September 2017. HDFC posted a 25% jump in standalone net profit at Rs 2,467 crore in the second quarter ended September 30. India's largest standalone housing finance company reported a 19% year-on-year growth in interest income at Rs 9,673 crore. Zydus Cadila has launched Vardenafil Hydrochloride Tablets (US RLD - LEVITRA Tablets), 2.5 mg, 5 mg, 10 mg and 20 mg in the US market upon receiving the final approval from the USFDA. Ashok Leyland reported a 17% rise in total sales at 15,149 units in October. Oil and Natural Gas Corporation will draw a new perspective plan to integrate recent acquisition HPCL and just commissioned petrochemical unit with its mainstay oil and gas exploration and production operations, its Chairman and MD Shashi Shanker said, according to media reports. Fitch Ratings has affirmed IDBI Bank's long-term issuer default rating (IDR) at 'BB+' and its viability rating (VR) at 'ccc'.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(54.1)	(178.7)	(54.6)
MF(INR cr)	2,075.6	1,141.9	510.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,594	40,594	35,510
F&O(INR cr)	1,817,982	1,817,982	977,281

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.2	19.8	14.9
NSE VIX	19.2	19.2	14.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,324	0.7 %	4.1 %	Energy	13,742	(0.1) %	3.4 %
IT	14,622	(2.1) %	15.1 %	Pharma	9,609	(1.5) %	11.5 %
Metals	3,338	1.3 %	(5.7) %	Finance	10,685	0.4 %	4.1 %
Auto	8,814	(0.1) %	(20.3) %	PSU	2,941	0.9 %	3.0 %
FMCG	28,355	(0.7) %	7.0 %	Real Estate	221	2.8 %	(25.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	204	8.5 %	(33.4) %	HCL Techno	1,009	(4.4) %	3.0 %
United Spi	620	7.4 %	(5.1) %	Lupin	852	(3.8) %	9.6 %
L&T Fin.Ho	136	6.3 %	(15.3) %	Dabur Indi	371	(3.7) %	10.3 %
ICICI Lomb	851	5.6 %	8.5 %	Dr Reddy's	2,462	(3.2) %	15.5 %
Bandhan Ba	411	5.4 %	(13.5) %	Tech Mahin	721	(3.1) %	12.6 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Producer Price Index (QoQ) (3Q)	02-11-2018	0:30	AUD	-	-
Producer Price Index (YoY) (3Q)	02-11-2018	0:30	AUD	-	-
Retail Sales (MoM) (SEP)	02-11-2018	0:30	AUD	-	-
Retail Sales Ex Inflation (QoQ) (3Q)	02-11-2018	0:30	AUD	-	-
Full Time Employment Change (OCT)	02-11-2018	12:30	CAD	-	-
Hourly Earnings Permanent Employees (YoY) (OCT)	02-11-2018	12:30	CAD	-	-
International Merchandise Trade (Canadian dollar) (SEP)	02-11-2018	12:30	CAD	-	0.53b
Net Change in Employment (OCT)	02-11-2018	12:30	CAD	-	63.3k
Part Time Employment Change (OCT)	02-11-2018	12:30	CAD	-	-
Participation Rate (OCT)	02-11-2018	12:30	CAD	-	-
Unemployment Rate (OCT)	02-11-2018	12:30	CAD	-	-
UBS Real Estate Bubble Index (3Q)	02-11-2018	7:00	CHF	-	-
Retail Sales Real (YoY) (SEP)	02-11-2018	8:15	CHF	-	-
German Import Price Index (MoM) (SEP)	02-11-2018	7:00	EUR	-	-
German Import Price Index (YoY) (SEP)	02-11-2018	7:00	EUR	-	-
Markit/ADACI Italy Manufacturing PMI (OCT)	02-11-2018	8:45	EUR	-	-
Markit France Manufacturing PMI (OCT F)	02-11-2018	8:50	EUR	-	-
Markit/BME Germany Manufacturing PMI (OCT F)	02-11-2018	8:55	EUR	-	-
Markit Eurozone Manufacturing PMI (OCT F)	02-11-2018	9:00	EUR	-	-
Markit/CIPS UK Construction PMI (OCT)	02-11-2018	9:30	GBP	-	-
Average Hourly Earnings (MoM) (OCT)	02-11-2018	12:30	USD	-	-
Average Hourly Earnings (YoY) (OCT)	02-11-2018	12:30	USD	-	-
Average Weekly Hours All Employees (OCT)	02-11-2018	12:30	USD	-	-
Change in Manufact. Payrolls (OCT)	02-11-2018	12:30	USD	-	18k
Change in Non-farm Payrolls (OCT)	02-11-2018	12:30	USD	-	134k
Change in Private Payrolls (OCT)	02-11-2018	12:30	USD	-	121k
Labor Force Participation Rate (OCT)	02-11-2018	12:30	USD	-	-
Trade Balance (SEP)	02-11-2018	12:30	USD	-	(\$53.2b)
Three Month Retail Net Position (OCT)	02-11-2018	12:30	USD	-	-



Underemployment Rate (OCT)	02-11-2018	12:30	USD	-	-
Unemployment Rate (OCT)	02-11-2018	12:30	USD	-	-
Cap Goods Orders Nondef Ex Air (SEP F)	02-11-2018	14:00	USD	-	-
Cap Goods Ship Nondef Ex Air (SEP F)	02-11-2018	14:00	USD	-	-
Durable Goods Orders (SEP F)	02-11-2018	14:00	USD	-	-
Durables Ex Transportation (SEP F)	02-11-2018	14:00	USD	-	-
Factory Orders (SEP)	02-11-2018	14:00	USD	-	-
Factory Orders Ex Trans (SEP)	02-11-2018	14:00	USD	-	-
Baker Hughes U.S. Rig Count (NOV 2)	02-11-2018	17:00	USD	-	-

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