



02 Dec.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,056	(0.8) %	3.3 %
BSE SENSEX	40,794	(0.8) %	4.9 %
CNX BANK	31,946	(0.6) %	5.3 %
CNX MIDCAP	17,222	0.1 %	(6.1) %
CNX SMALLCAP	5,815	0.9 %	(13.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,051	(0.4) %	20.3 %
S&P 500	3,141	(0.4) %	25.3 %
FTSE 100	7,347	(0.9) %	9.1 %
HANG SENG	26,346	(2.0) %	4.8 %
NIKKEI	23,294	(0.5) %	19.1 %
SHANGHAI COMPOSITE	2,872	(0.6) %	16.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.51	0.3 %	3.0 %
EUR/USD	1.10	0.0 %	(3.9) %
GBP/USD	1.29	(0.1) %	1.3 %
USD/JPY	109.52	0.0 %	(0.1) %
USD/AUD	1.48	(0.0) %	4.0 %
USD/SGD	1.37	0.1 %	0.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.0 %	24.9 %
Gold(INR/10g)	37,876	0.3 %	20.1 %
Gold Comex(USD/oz)	1,462	0.4 %	13.3 %
SILVER(INR/1Kg)	44,303	0.1 %	15.8 %
Aluminium(USD/MT)	1,786	1.7 %	(3.9) %
Copper(USD/MT)	5,854	(0.5) %	0.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	0.0 %	(0.9) %

**Global Economy:** Eurozone inflation rose to 1% in November from 0.7% in October, on food and services cost, flash data from Eurostat showed Friday. Headline inflation remained well below the European Central Bank's target of "below, but close to 2%." On a monthly basis, consumer prices dropped 0.3% in November. Core inflation that excludes energy, food, alcohol and tobacco, climbed to 1.3% from 1.1% in October. The number of people out of work in Germany declined by a seasonally adjusted 16,000 after rising 5,000 a month ago, data from the Federal Employment Agency showed Friday. The unemployment rate held steady near a record low, at 5% in November. Germany retail sales grew only 0.8% annually in October after expanding 3.4% in September. UK mortgage approvals for house purchases fell to 64,602 in October from 65,803 in September, data from the Bank of England showed Friday. Lending secured on dwelling increased by GBP 4.3 billion or 0.3% in October. The extra amount borrowed by consumers in order to buy goods and services rose to GBP 1.3 billion. Annual growth in consumer credit advanced to 6.1% from 5.9%. This was the first increase in the annual growth rate since June 2018. According to preliminary data from Japan's Ministry of Economy, Trade and Industry, industrial production plunged 4.2% month-on-month in October, in contrast to September's 1.7% increase. Japan's consumer confidence edged up to the highest level in five months in November, data from the Cabinet Office showed. The consumer confidence index rose to a seasonally adjusted 38.7 in November from 36.2 in October.

**Global Equities:** The US stocks pulled back off record closing highs amid thin trades in a shortened trading session on Friday.

**Indian Economy:** According to data released by the Ministry of Statistics and Program Implementation, the second quarter GDP (Gross Domestic Product) growth rate was 4.5% as against 7% during corresponding period of last fiscal (2018-19). This is the lowest growth rate after fourth quarter (January-March) of fiscal year 2012-13, when GDP growth rate was 4.3%. This marked sixth successive quarter of growth rate decline. Output of eight core infrastructure industries contracted by 5.8% in October, indicating the severity of economic slowdown, according to the government data released on Friday.

**Equity Markets:** Key equity market barometers corrected on Friday on worries of slower economic growth in the September quarter. Rising uncertainty over a US-China trade deal also kept sentiment in check. After hitting an intraday low of 12,017.40, the Nifty index managed to close above the 12,050 level. Mid and small-cap stocks bucked weak market trend. The barometer index, the BSE Sensex, fell 336.36 points or 0.82% to 40,793.81. The Nifty 50 index fell 95.10 points or 0.78% to 12,056.05.

**Corporate News:** Infosys signed an agreement with the Australian Federal Government's Services Australia to transform the entitlement calculation engine for the nation's welfare system. Maruti Suzuki India (MSIL) reported sales of 1,39,133, units of passenger vehicles in domestic market in November, down 3% as compared with 1,43,890 units in corresponding month last year. Mahindra & Mahindra reported 10% drop in its sales to 14,637 units during the month as compared with 16,188 units corresponding month last year.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	227.6	171.3	41.0
MF(INR cr)	(135.5)	(135.5)	329.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	47,656	44,435	36,919
F&O(INR cr)	778,770	1,356,544	1,348,316

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.0	17.8	16.0
NSE VIX	13.9	15.3	17.1

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,946	(0.6) %	5.3 %	Energy	16,232	(0.8) %	(1.8) %
IT	14,998	(0.8) %	(5.3) %	Pharma	8,190	(1.0) %	(12.6) %
Metals	2,626	(1.2) %	(15.4) %	Finance	14,209	(0.5) %	13.7 %
Auto	8,086	(1.1) %	(3.9) %	PSU	2,670	(1.7) %	(21.1) %
FMCG	30,976	(0.9) %	2.6 %	Real Estate	282	1.0 %	5.6 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharti Inf	276	7.7 %	(12.1) %	Indiabulls	291	(13.2) %	(65.7) %
L&T Fin.Ho	120	5.1 %	(20.9) %	Zee Entert	293	(5.8) %	(32.1) %
Container	579	4.7 %	9.0 %	Motherson	130	(3.6) %	(15.7) %
Vodafone I	7	3.8 %	(61.4) %	HDFC AMC	3,537	(3.4) %	127.3 %
Adani Port	382	2.5 %	(0.3) %	Ashok Leyl	79	(2.8) %	(12.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (NOV)	02-12-2019	11:00	AUD	-	116.5
AiG Performance of Manufacturing Index (NOV)	02-12-2019	3:00	AUD	-	51.6
CBA Australia PMI Mfg (NOV F)	02-12-2019	3:30	AUD	-	49.9
CoreLogic House Px (MoM) (NOV)	02-12-2019	4:30	AUD	-	0.014
TD Securities Inflation (YoY) (NOV)	02-12-2019	5:30	AUD	-	0.015
Building Approvals (YoY) (OCT)	02-12-2019	6:00	AUD	-	(0.19)
MLI Leading Indicator (MoM) (OCT)	02-12-2019	19:00	CAD	-	0.002
RBC Canadian Manufacturing PMI (NOV)	02-12-2019	20:00	CAD	-	51.2
PMI Manufacturing (NOV)	02-12-2019	14:00	CHF	-	49.4
Domestic Sight Deposits CHF (NOV 29)	02-12-2019	14:30	CHF	-	-
Caixin China PMI Mfg (NOV)	02-12-2019	7:15	CNY	-	51.7
Markit/ ADACI Italy Manufacturing PMI (NOV)	02-12-2019	14:15	EUR	-	47.7
Markit France Manufacturing PMI (NOV F)	02-12-2019	14:20	EUR	-	51.6
Markit/BME Germany Manufacturing PMI (NOV F)	02-12-2019	14:25	EUR	-	43.8
ECB President Lagarde Testifies at European Parliament	02-12-2019	19:30	EUR	-	-
Markit UK PMI Manufacturing s.a. (NOV F)	02-12-2019	15:00	GBP	-	48.3
Vehicle Sales (YoY) (NOV)	02-12-2019	10:30	JPY	-	(0.264)
Loans & Discounts Corp (YoY) (OCT)	02-12-2019	5:20	JPY	-	0.019
Markit Mexico PMI Mfg (NOV)	02-12-2019	21:00	MXN	-	50.4
Terms of Trade Index (QoQ) (3Q)	02-12-2019	3:15	NZD	-	0.016
Treasury Publishes Monthly Economic Indicators	02-12-2019	6:30	NZD	-	-
Markit US Manufacturing PMI (NOV F)	02-12-2019	20:15	USD	-	52.2
ISM Employment (NOV)	02-12-2019	20:30	USD	-	47.7
U.S. to Sell 13-Week Bills	02-12-2019	22:00	USD	-	-

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