



03 Dec.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,877	0.0 %	6.5 %
BSE SENSEX	36,194	0.1 %	8.8 %
CNX BANK	26,863	0.0 %	10.4 %
CNX MIDCAP	17,504	0.0 %	(8.3) %
CNX SMALLCAP	6,216	0.0 %	(21.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,538	0.8 %	2.9 %
S&P 500	2,760	0.8 %	2.4 %
FTSE 100	6,980	(0.8) %	(8.7) %
HANG SENG	26,507	0.2 %	(13.1) %
NIKKEI	22,351	0.4 %	(4.9) %
SHANGHAI COMPOSITE	2,588	0.8 %	(22.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.58	(0.4) %	9.3 %
EUR/USD	1.13	(0.7) %	(5.8) %
GBP/USD	1.27	(0.3) %	(5.7) %
USD/JPY	113.57	0.2 %	0.8 %
USD/AUD	1.37	0.2 %	7.0 %
USD/SGD	1.37	0.1 %	2.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	(1.0) %	(15.6) %
Gold(INR/10g)	30,269	(0.3) %	3.1 %
Gold Comex(USD/oz)	1,228	(0.2) %	(6.2) %
SILVER(INR/1Kg)	35,519	(0.8) %	(8.0) %
Aluminium(USD/MT)	1,935	0.1 %	(14.2) %
Copper(USD/MT)	6,238	(0.7) %	(13.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	(0.0) %	0.5 %

Global Economy: MNI Indicators said its Chicago business barometer soared to 66.4 in November after falling to 58.4 in October, with a reading above 50 indicating growth in business activity. The jump reflected increases across all five of the barometer's subcomponents, with resurgent orders, solid output and higher unfinished orders the month's key drivers. The report said the new orders index jumped to its highest level since May of 2014 in November after easing over the two previous months, while the production index rose for the second straight month to reach a three-month high. The manufacturing sector in China was stagnant in November, the latest survey from the National Bureau of Statistics said on Friday with a manufacturing PMI score of 50.0. This marked a slight drop from 50.2 in October. The non-manufacturing PMI came in with a score of 53.4, falling from 53.9 in the previous month. The composite index came in at 52.8, down from 53.1 in last month. Eurozone's consumer price index rose 2% year-on-year in November following a 2.2% increase in October, preliminary figures from the Eurostat showed. Core inflation dropped to 1% from 1.1%.

Global Equities: The US stocks edged up on supportive economic data and strong buying support. The US President Donald Trump agreed not to boost tariffs on \$200 billion of Chinese goods to 25% on January 1 as previously announced and this is expected to boost the risk sentiment.

Indian Economy: India's gross domestic product (GDP) rose 7.1% in July-September, down from 8.2% in the previous quarter though it still marked a comforting uptick compared to the previous year's 6.3% reading in the same quarter. The manufacturing sector expanded 7.4% following 13.5% surge in the previous quarter while the agriculture sector grew 3.8% from 5.3% in the previous quarter. Trade, Hotel, Transport, Communication & Services related to Broadcasting rose 6.80%, almost matching the growth in previous quarter. Financial, Real Estate & Professional Services expanded 6.30%, easing slightly from a 6.52% in previous quarter. The combined Index of Eight Core Industries stood at 134.8 in October, 2018, which was 4.8% higher as compared to the index of October, 2017. Its cumulative growth during April to October, 2018-19 was 5.4%. The Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP).

Equity Markets: The local stocks extended gains for fifth day in a row, supported by recent weakness in crude oil prices and strength in local currency. Increase in fund flows from foreign portfolio investors also boosted sentiment. However, the benchmark indices erased some of their gains as profit selling emerged at higher levels.

Corporate News: Maruti Suzuki India said its sales fell 0.7% to 153,539 units in November 2018 over November 2017. Hero MotoCorp said its sales rose 0.82% to 610,252 units in November 2018 over November 2017. Mahindra & Mahindra (M&M) said its auto sales rose 17% to 45,101 units in November 2018 over November 2017. Tata Motors reported a drop in November sales. The sales performance of Tata Motors commercial and passenger vehicles business in the domestic market, for the first time witnessed a drop of 4% at 50,470 units in November 2018 as against 52,464 units in November 2017, due to low consumer sentiments as a result of liquidity crisis in the industry, higher interest rates and rising fuel costs. Aviation stocks will be watched after state-owned oil marketing companies (OMCs) on Saturday, 1 December 2018, reduced the aviation turbine fuel (ATF), or jet fuel, prices by 10.90% in New Delhi. Accordingly, jet fuel prices have been cut by Rs 8,327.83 in Delhi and now sells at Rs 68,050.97 per kilolitre. Prices vary with airports depending on local taxes. Jet fuel per kilolitre now costs Rs 73,393.55 in Kolkata, Rs 67,979.58 in Mumbai and Rs 69,216.61 in Chennai. Biocon will be watched. Fulphila, a biosimilar Pegfilgrastim jointly developed by Biocon and Mylan, has been approved in EU. The European Commission has granted marketing authorization for Fulphila to Biocon's partner Mylan.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	171.0	52.4	(43.4)
MF(INR cr)	87.0	122.9	468.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	44,651	32,017	35,056
F&O(INR cr)	439,240	964,755	970,744

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.1	19.4	15.5
NSE VIX	19.2	18.8	14.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,863	(0.3) %	10.4 %	Energy	14,324	(0.3) %	7.8 %
IT	14,638	1.2 %	15.2 %	Pharma	9,276	2.0 %	7.6 %
Metals	3,164	(0.4) %	(10.6) %	Finance	11,439	0.1 %	11.5 %
Auto	9,270	0.7 %	(16.2) %	PSU	2,915	(0.6) %	2.1 %
FMCG	30,126	0.1 %	13.7 %	Real Estate	232	2.2 %	(21.7) %

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>
United Spi	672	6.1 %	2.9 %	Oil India	186	(7.8) %	(18.0) %
Yes Bank	170	5.8 %	(44.6) %	Vodafone I	35	(6.7) %	(54.6) %
Britannia	3,170	4.5 %	24.1 %	H P C L	232	(4.3) %	(32.6) %
ICICI Lomb	834	4.0 %	6.4 %	Sun TV Net	592	(4.0) %	(31.2) %
Avenue Sup	1,493	3.8 %	10.0 %	Bharti Inf	257	(3.3) %	(24.0) %

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					

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