



03 Dec.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,025	(0.2) %	3.1 %
BSE SENSEX	40,802	0.0 %	4.8 %
CNX BANK	31,780	(0.3) %	4.8 %
CNX MIDCAP	17,066	(0.2) %	(6.9) %
CNX SMALLCAP	5,756	(0.1) %	(14.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,783	(1.0) %	19.1 %
S&P 500	3,114	(0.9) %	24.2 %
FTSE 100	7,286	(0.8) %	8.2 %
HANG SENG	26,445	0.4 %	5.2 %
NIKKEI	23,530	1.0 %	20.3 %
SHANGHAI COMPOSITE	2,876	0.1 %	16.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.51	0.0 %	3.0 %
EUR/USD	1.10	0.1 %	(3.8) %
GBP/USD	1.29	0.1 %	1.4 %
USD/JPY	109.56	0.0 %	(0.1) %
USD/AUD	1.48	0.2 %	4.1 %
USD/SGD	1.37	0.1 %	0.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(3.7) %	20.2 %
Gold(INR/10g)	37,795	(0.2) %	19.9 %
Gold Comex(USD/oz)	1,461	(0.1) %	13.2 %
SILVER(INR/1Kg)	44,132	(0.4) %	15.3 %
Aluminium(USD/MT)	1,790	0.2 %	(3.7) %
Copper(USD/MT)	5,856	0.0 %	0.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	0.1 %	(0.8) %

Global Economy: The ISM said it's US purchasing managers index edged down to 48.1 in November from 48.3 in October, with a reading below 50 indicating a contraction in manufacturing activity. China's manufacturing Purchasing Managers' Index edged up slightly to 51.8 in November from 51.7 in October, survey data from the IHS Markit showed Monday. The reading signaled an improvement for the fourth consecutive month and the strongest since December 2016. According to the official survey released over the weekend, the Chinese manufacturing sector returned to growth in November. The PMI advanced to 50.2 from 49.3 and the non-manufacturing PMI advanced to 54.4 from 52.8. The euro area manufacturing sector continued to contract in November but the pace of decline slowed from October, final data from IHS Markit showed Monday. The factory Purchasing Managers' Index improved to 46.9 in November from 45.9 in October and above the flash 46.6. The reading remained below the neutral 50.0 mark and extended the current period of contraction to ten months. UK manufacturing downturn continued in November amid the uncertainty caused by the forthcoming general elections and the delay in Brexit, a closely watched survey showed Monday. The headline factory PMI fell to 48.9 from 49.6 in October. Japan manufacturing sector continued to contract in November with a manufacturing PMI score of 48.9, the latest survey from Nikkei revealed on Monday. That's up from 48.4 in October. Australia manufacturing sector fell into contraction in November with a seasonally adjusted Performance of Manufacturing Index Score of 48.1, the latest survey from the Australian Industry Group revealed. That's down from 51.6 in October and also represents a three-year low for the index.

Global Equities: The US stocks slipped as President Donald Trump announced plans to reinstate tariffs on metal imports from Brazil and Argentina. DOW dropped around 1%.

Indian Economy: The IHS Markit India Manufacturing PMI rose from 50.6 in October, when it had fallen to a two-year low, to 51.2 in November. The latest reading was below the survey average (53.8) and indicated only a slight improvement in the health of the sector. Although business conditions in the Indian manufacturing sector improved in November, the upturn remained subdued compared to earlier in the year and the survey history. Though the growth of GDP has decelerated sharply in the last quarter to 4.5%, string of reforms undertaken during the last few months will refuel the growth trajectory of the country and we are very much hopeful that growth will rebound in the next quarter, said D K Aggarwal, President, PHD Chamber of Commerce and Industry in a press statement. Ministry of Petroleum & Natural Gas noted that development of India's energy infrastructure will involve huge investments in oil and gas infrastructure of more than 100 billion dollars including in exploration and production of oil and gas, oil refining, pipelines, city gas distribution networks and LNG terminals.

Equity Markets: Key equity barometers ended almost flat after a volatile session on Monday. Weak economic numbers lower than expected auto sales and profit booking, capped equity market gains. Investors were cautious ahead of the central bank's monetary policy meeting on Thursday, 5 December 2019.

Corporate News: Biocon will be watched after the US launch of biosimilar. Biocon and Mylan N.V. announced the U S launch of Ogivri TM (trastuzumab-dkst), a biosimilar to Herceptin (trastuzumab). It will offer Ogivri in both the 420mg and 150mg strengths, increasing access to treatment for thousands of HER2-positive breast and gastric cancer patients. United Spirits said it has considered and approved a scheme of amalgamation and arrangement in relation to the proposed merger of the Company's listed subsidiary Pioneer Distilleries Limited with the Company. Bank of Baroda said meeting of the Capital Raising Committee (CRC) of whole time Directors of the Bank is scheduled to be held on 5 December 2019 to consider raising of capital funds through issue of capital debt instruments. RBL Bank said it has launched the qualified institutional placement issue for subscription on December



2. The Capital Raising Committee of the bank approved the floor price for the QIP being Rs 352.57 per equity share, at a 5.5% discount to Monday's closing price.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(104.7)	157.5	40.1
MF(INR cr)	(122.7)	(294.7)	299.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	41,863	41,863	36,949
F&O(INR cr)	816,662	816,662	1,345,054

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	16.0
NSE VIX	14.2	14.2	17.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,871	(0.2) %	5.1 %	Energy	16,259	0.2 %	(1.7) %
IT	14,852	(1.0) %	(6.2) %	Pharma	8,129	(0.7) %	(13.3) %
Metals	2,633	0.3 %	(15.1) %	Finance	14,163	(0.3) %	13.3 %
Auto	8,013	(0.9) %	(4.8) %	PSU	2,647	(0.9) %	(21.8) %
FMCG	30,890	(0.3) %	2.3 %	Real Estate	281	(0.4) %	5.2 %

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>
Vodafone I	8	13.9 %	(56.1) %	Yes Bank	64	(6.2) %	(76.8) %
Indiabulls	304	4.7 %	(64.1) %	Eicher Mot	21,713	(5.1) %	8.3 %
Bharti Air	459	3.7 %	46.6 %	Bharti Inf	266	(3.9) %	(15.5) %
NMDC	106	2.9 %	0.1 %	HDFC AMC	3,403	(3.8) %	118.7 %
Motherson	133	2.7 %	(13.4) %	Bajaj Fin.	3,950	(3.0) %	31.6 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
ANZ Roy Morgan Weekly Consumer Confidence Index (DEC 1)	03-12-2019	4:00	AUD	-	106.8
Current Account Balance (Australian Dollar) (3Q)	03-12-2019	6:00	AUD	-	-
RBA Cash Rate Target (DEC 3)	03-12-2019	9:00	AUD	-	0.0075
CPI Core (YoY) (NOV)	03-12-2019	13:00	CHF	-	0.002
Euro-Zone Producer Price Index (MoM) (OCT)	03-12-2019	15:30	EUR	-	0.001
Markit/CIPS UK Construction PMI (NOV)	03-12-2019	15:00	GBP	-	44.2
BRC Sales Like-For-Like (YoY) (NOV)	03-12-2019	5:31	GBP	-	0.001
Monetary Base (YoY) (NOV)	03-12-2019	5:20	JPY	-	0.031
QV House Prices (YoY) (NOV)	03-12-2019	21:30	NZD	-	0.028
U.S. to Sell 52-Week Bills	03-12-2019	22:00	USD	-	-

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