



04 Dec.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|----------|
| CNX NIFTY | 10,855 | (0.3) % | 6.3 % |
| BSE SENSEX | 36,241 | 0.1 % | 8.6 % |
| CNX BANK | 26,731 | (0.5) % | 9.9 % |
| CNX MIDCAP | 17,654 | 0.1 % | (7.6) % |
| CNX SMALLCAP | 6,303 | 0.5 % | (20.5) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|-------|----------|
| DOW JONES | 25,826 | 1.1 % | 4.0 % |
| S&P 500 | 2,790 | 1.1 % | 3.5 % |
| FTSE 100 | 7,062 | 1.2 % | (7.7) % |
| HANG SENG | 27,182 | 2.6 % | (10.9) % |
| NIKKEI | 22,575 | 1.0 % | (4.0) % |
| SHANGHAI COMPOSITE | 2,655 | 2.6 % | (20.7) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.46 | 1.3 % | 10.7 % |
| EUR/USD | 1.14 | 0.4 % | (5.4) % |
| GBP/USD | 1.27 | (0.1) % | (5.8) % |
| USD/JPY | 113.31 | (0.2) % | 0.5 % |
| USD/AUD | 1.36 | (0.7) % | 6.3 % |
| USD/SGD | 1.37 | (0.5) % | 2.3 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|-------|----------|
| WTI Crude(USD/bbl) | 53 | 4.0 % | (12.3) % |
| Gold(INR/10g) | 30,664 | 1.3 % | 4.4 % |
| Gold Comex(USD/oz) | 1,241 | 1.1 % | (5.2) % |
| SILVER(INR/1Kg) | 36,111 | 1.7 % | (6.5) % |
| Aluminium(USD/MT) | 1,983 | 2.5 % | (12.1) % |
| Copper(USD/MT) | 6,307 | 1.1 % | (12.2) % |

FIXED INCOME

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

Global Economy: Manufacturing activity in the US unexpectedly grew at a faster rate in the month of November, according to a report released by the Institute for Supply Management on Monday. The ISM said its purchasing managers index climbed to 59.3 in November after falling to 57.7 in October. China manufacturing sector accelerated slightly in November, the latest survey from Caixin revealed on Monday with a manufacturing PMI score of 50.2. It moved slightly further above the boom-or-bust line of 50 that separates expansion from contraction. Eurozone's manufacturing growth slowed in November, amid marginal growth in output and weak business confidence, and was the lowest since August 2016, final data from IHS Markit showed. The manufacturing purchasing managers' index (PMI) came in at 51.8 from 52 in October. The flash reading was 51.5. A PMI reading above 50 suggests growth in the sector, which expanded for a sixty-fifth month running. UK CIPS manufacturing PMI rose to 53.1 in November from October's 27-month low of 51.1, survey data from IHS Markit showed. However, the latest PMI was among the weakest registered over the past two-and-a-half years, IHS Markit said.

Global Equities: Risk appetite was supported nicely and the markets started the new week on an upbeat note as trade talks appeared to be turning in the right direction.

Indian Economy: India's factory production continued to improve further in November as the manufacturing purchasing managers' index (PMI) rose to 54 against 53.1 in October. This is the highest level in 11 months or the index. According to IHS Markit, the manufacturing conditions in India strengthened for the third successive month in November, as healthier inflow of new orders encouraged companies to lift production and input buying to a greater extent than in October. Cost inflation moderated, but the revival in demand translated into improved pricing power among producers who raised their charges at a quicker rate. Meanwhile, the job creation was sustained as well. This index is prepared on the basis of a survey which is conducted among purchasing executives in over 400 companies.

Equity Markets: Key equity benchmarks extended gains for sixth straight trading session. However, the trading was volatile as gains triggered by strong global cues were almost offset by lower-than-expected domestic GDP data. Selling in Sun Pharmaceutical Industries, Reliance Industries and Mahindra & Mahindra capped gains. Global shares were upbeat as truce talks between US and Chinese leaders at the G20 summit improved investors' risk appetite.

Corporate News: NMDC reduced prices of high grade iron ore (lumps) by Rs 300 to Rs 3550 per tonne for the current month. The state-run firm has also cut the prices for iron ore fines, which are inferior grade ore, by Rs 200 to Rs 3,110 per tonne for December 2018. GAIL (India) said that the CESTAT Delhi Vide order dated 30 November 2018 has allowed the appeal filed by the Department and held that the product manufactured by GAIL at its gas processing Plants is 'Natural Gasoline Liquid (NGL)' and not Naphtha, attracting additional excise duty of Rs 15 litre. Ceinsys Tech has bagged project from Thane Smart City worth Rs. 121.04 crore towards Supply, Installation, Commissioning, Operation & Maintenance for Smart Water Meter & Related Infrastructure Work for Water Supply System of Thane City.



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|---------|-------|--------|
| FII(USD mm) | (22.7) | 48.2 | (43.3) |
| MF(INR cr) | 1,312.2 | 230.3 | 477.6 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 36,140 | 36,140 | 35,062 |
| F&O(INR cr) | 425,999 | 425,999 | 967,462 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 16.4 | 16.4 | 15.5 |
| NSE VIX | 18.2 | 18.2 | 14.8 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|---------|----------|-------------|--------|---------|----------|
| Banks | 26,858 | (0.0) % | 10.4 % | Energy | 14,334 | 0.1 % | 7.8 % |
| IT | 14,740 | 0.7 % | 16.0 % | Pharma | 9,053 | (2.4) % | 5.0 % |
| Metals | 3,228 | 2.0 % | (8.8) % | Finance | 11,429 | (0.1) % | 11.4 % |
| Auto | 9,261 | (0.1) % | (16.3) % | PSU | 2,944 | 1.0 % | 3.1 % |
| FMCG | 30,348 | 0.7 % | 14.5 % | Real Estate | 238 | 2.4 % | (19.8) % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|-------|----------|------------|--------|---------|----------|
| Indiabulls | 783 | 9.4 % | (37.0) % | Sun Pharma | 455 | (7.6) % | (10.3) % |
| Motherson | 165 | 6.2 % | (23.3) % | Interglobe | 983 | (5.3) % | (26.0) % |
| Yes Bank | 178 | 4.8 % | (41.9) % | Ashok Leyl | 107 | (4.6) % | (27.7) % |
| Colgate-Pa | 1,273 | 4.4 % | 20.4 % | LIC Housin | 446 | (4.3) % | (17.3) % |
| Hind. Unil | 1,826 | 4.1 % | 35.1 % | M & M | 761 | (3.8) % | 1.7 % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--|------------|-----------|--------|--------|----------------|
| Current Account Balance (Australian Dollar) (3Q) | 04-12-2018 | 00:30 | AUD | - | - |
| Net Exports of Gross Domestic Product (3Q) | 04-12-2018 | 00:30 | AUD | - | 0.1 |
| RBA Cash Rate Target (DEC 4) | 04-12-2018 | 03:30 | AUD | - | 0.015 |
| AiG Performance of Service Index (NOV) | 04-12-2018 | 21:30 | AUD | - | 51.1 |
| CBA Australia PMI Composite (NOV F) | 04-12-2018 | 22:00 | AUD | - | 52.9 |
| CBA Australia PMI Services (NOV F) | 04-12-2018 | 22:00 | AUD | - | 52.6 |
| Labor Productivity (QoQ) (3Q) | 04-12-2018 | 13:30 | CAD | - | 0.007 |
| Consumer Price Index (MoM) (NOV) | 04-12-2018 | 08:15 | CHF | - | 0.002 |
| Consumer Price Index (YoY) (NOV) | 04-12-2018 | 08:15 | CHF | - | 0.011 |
| CPI Core (YoY) (NOV) | 04-12-2018 | 08:15 | CHF | - | 0.004 |
| CPI EU Harmonized (MoM) (NOV) | 04-12-2018 | 08:15 | CHF | - | 0.002 |
| CPI EU Harmonized (YoY) (NOV) | 04-12-2018 | 08:15 | CHF | - | 0.011 |
| Euro-Zone Producer Price Index (MoM) (OCT) | 04-12-2018 | 10:00 | EUR | - | 0.005 |
| Euro-Zone Producer Price Index (YoY) (OCT) | 04-12-2018 | 10:00 | EUR | - | 0.045 |
| BRC Sales Like-For-Like (YoY) (NOV) | 04-12-2018 | 00:01 | GBP | - | 0.001 |
| BOE Governor Carney Speaks at U.K. Parliament | 04-12-2018 | 09:15 | GBP | - | - |
| Markit/CIPS UK Construction PMI (NOV) | 04-12-2018 | 09:30 | GBP | - | 53.2 |
| BOE's Vlieghe Speaks in Plymouth | 04-12-2018 | 18:00 | GBP | - | - |
| QV House Prices (YoY) (NOV) | 04-12-2018 | 16:00 | NZD | - | 0.054 |
| ANZ Job Advertisements (MoM) (NOV) | 04-12-2018 | 21:00 | NZD | - | 0.014 |
| Volume of All Buildings SA (QoQ) (3Q) | 04-12-2018 | 21:45 | NZD | - | 0.008 |
| Williams Holds Press Briefing at New York Fed | 04-12-2018 | 15:00 | USD | - | - |
| U.S. to Sell 4-Week Bills | 04-12-2018 | 16:30 | USD | - | - |
| U.S. to Sell 8-Week Bills | 04-12-2018 | 16:30 | USD | - | - |
| U.S. to Sell USD26 Bln 52-Week Bills | 04-12-2018 | 18:00 | USD | - | - |

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