



**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,994	(0.4) %	2.8 %
BSE SENSEX	40,675	(0.3) %	4.6 %
CNX BANK	31,613	(0.8) %	4.2 %
CNX MIDCAP	16,918	(1.1) %	(7.7) %
CNX SMALLCAP	5,722	(0.7) %	(15.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,503	(1.0) %	17.9 %
S&P 500	3,093	(0.7) %	23.4 %
FTSE 100	7,159	(1.8) %	6.3 %
HANG SENG	26,391	(0.2) %	5.0 %
NIKKEI	23,380	(0.6) %	19.5 %
SHANGHAI COMPOSITE	2,885	0.3 %	17.0 %

**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)	38,062	0.7 %	20.7 %
Gold Comex(USD/oz)	1,477	1.1 %	14.4 %
SILVER(INR/1Kg)	44,437	0.7 %	16.1 %
Aluminium(USD/MT)	1,802	0.7 %	(3.0) %
Copper(USD/MT)	5,812	(0.7) %	(0.5) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	(0.1) %	(0.9) %

**Global Economy:** Eurozone producer prices declined at the fastest pace in more than three years in October, data from Eurostat showed Tuesday. Producer prices decreased 1.9% year-on-year in October following a 1.2% drop in September. Eurozone growth remains weak mainly due to the impact of global factors and there are signs of that the slowdown in manufacturing is spreading to other sectors, European Central Bank President Christine Lagarde said. Australia's central bank left its key interest rate unchanged on Tuesday, as policymakers wait to see the impact of previous easing. The board of the Reserve Bank of Australia, governed by Philip Lowe, decided to leave the cash rate unchanged at a record 0.75%.

**Global Equities:** Stocks eased broadly on Tuesday after the Trump administration announced plans to reinstate tariffs on metal imports from Brazil and Argentina and proposed retaliatory tariffs against France for its new digital services tax.

**Indian Economy:** Nirmala Sitharaman, Union Minister for Finance & Corporate Affairs, had announced in September the launch of Customer Outreach Initiative by Public Sector Banks (PSBs) to improve credit delivery and support the needs of the economy, with particular focus on MSMEs, NBFCs, corporates, retail and agriculture sector borrowers, without compromising prudential lending. Customer Outreach in October 2019 resulted in total credit disbursement of Rs 2.52 lakh crore. Government has planned exploration of 37 coal blocks and 10 lignite blocks along with drilling of 121 coal blocks and one lignite block in the current fiscal in addition to exploration and drilling of coal blocks allocated to state-run Coal India Limited (CIL) informed the Coal Minister Pralhad Joshi to the Parliament on Monday. Public sector banks disbursed a record Rs 4.91 lakh crore of loans during the festive month of October and November, the finance ministry said on Tuesday.

**Equity Markets:** Key equity benchmarks fell on Tuesday in line with other global stock markets as investors panicked after the US decision to impose tariffs on Argentina and Brazil. Concern about India's slowing economic growth and unabated foreign fund outflows also weighed heavily on the market sentiment. Investors were also cautious ahead of the central bank's monetary policy outcome on Thursday, 5 December 2019. The barometer index, the BSE Sensex, fell 126.72 points or 0.31% to 40,675.45. The Nifty 50 index fell 54 points or 0.45% to 11,994.20.

**Corporate News:** Hares of CSB Bank will be watched as it lists today. The issue was subscribed 86.93 times. The qualified institutional buyers (QIBs) category was subscribed 62.18 times. The non-institutional investors category was subscribed 164.68 times. The retail individual investors (RIIs) category was subscribed 44.53 times. The price band was fixed at Rs 193 to Rs 195 per share and the final issue price was Rs 195 per share. HDFC Asset Management Company said one of its promoters, Standard Life Investments, proposes to sell up to 4,750,000 Equity Shares representing 2.23% of the total issued and paid-up Equity Share capital of the Company. The floor price for the Sale shall be Rs 3,170 per Equity Share. No discount is being offered to Retail Investors. IFCI said ICRA revised ratings of fund based Bank limits, long term bonds (including Subordinated Debt) and bonds / NCD (Public Issue) from ICRA BBB to ICRA BBB-. The rating on Short Term Instruments - Commercial Paper has been revised from [ICRA] A3+ to [ICRA] A3. Rating Rationale for downgrade has essentially factored the requirement of capital infusion, divestment from non-core assets (including investment in subsidiaries), stepping up the recovery from NPA to support capital and liquidity profile.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(201.9)	(201.9)	38.7
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)	37,251	39,557	36,951
F&O(INR cr)	978,982	897,822	1,342,822

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	16.0
NSE VIX	14.6	14.4	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	31,613	(0.8) %	4.2 %	Energy	16,112	(0.9) %	(2.5) %
IT	14,921	0.5 %	(5.8) %	Pharma	8,045	(1.0) %	(14.2) %
Metals	2,564	(2.6) %	(17.3) %	Finance	14,140	(0.2) %	13.1 %
Auto	7,964	(0.6) %	(5.3) %	PSU	2,571	(2.9) %	(24.0) %
FMCG	30,678	(0.7) %	1.6 %	Real Estate	285	1.3 %	6.6 %

## 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>
Bajaj Auto	3,260	3.2 %	11.8 %	Vodafone I	7	(9.6) %	(60.3) %
HDFC Life	585	2.7 %	52.3 %	Yes Bank	60	(7.1) %	(78.4) %
NMDC	108	2.5 %	2.6 %	Bharti Inf	248	(6.4) %	(20.9) %
SBI Life I	963	2.1 %	61.0 %	Piramal En	1,726	(5.2) %	(35.9) %
Bandhan Ba	578	1.8 %	9.1 %	Tata Steel	400	(5.0) %	(25.3) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
AiG Performance of Service Index (NOV)	04-12-2019	3:00	AUD	-	54.2
CBA Australia PMI Composite (NOV F)	04-12-2019	3:30	AUD	-	49.5
Gross Domestic Product (YoY) (3Q)	04-12-2019	6:00	AUD	-	0.014
Labor Productivity (QoQ) (3Q)	04-12-2019	19:00	CAD	-	0.002
Bank of Canada Rate Decision (DEC 4)	04-12-2019	20:30	CAD	-	0.0175
Caixin China PMI Composite (NOV)	04-12-2019	7:15	CNY	-	52
Markit Italy Composite PMI (NOV)	04-12-2019	14:15	EUR	-	50.8
Markit France Composite PMI (NOV F)	04-12-2019	14:20	EUR	-	52.7
Markit Germany Services PMI (NOV F)	04-12-2019	14:25	EUR	-	51.3
Markit Eurozone Composite PMI (NOV F)	04-12-2019	14:30	EUR	-	50.3
Markit/CIPS UK Composite PMI (NOV F)	04-12-2019	15:00	GBP	-	48.5
ANZ Commodity Price (NOV)	04-12-2019	5:30	NZD	-	0.012
MBA Mortgage Applications (NOV 29)	04-12-2019	17:30	USD	-	0.015
ADP Employment Change (NOV)	04-12-2019	18:45	USD	-	-
Markit US Composite PMI (NOV F)	04-12-2019	20:15	USD	-	51.9
DOE U.S. Crude Oil Inventories (NOV 29)	04-12-2019	21:00	USD	-	-

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