



INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,134	0.2 %	59.1 %
BSE SENSEX	44,633	0.0 %	57.9 %
CNX BANK	29,449	(0.0) %	61.7 %
CNX MIDCAP	20,127	0.6 %	75.5 %
CNX SMALLCAP	6,675	0.6 %	88.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,970	0.3 %	5.0 %
S&P 500	3,667	(0.1) %	13.5 %
FTSE 100	6,490	0.4 %	(14.7) %
HANG SENG	26,729	0.7 %	(6.4) %
NIKKEI	26,809	0.0 %	15.5 %
SHANGHAI COMPOSITE	3,442	(0.2) %	11.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.58	(0.4) %	3.3 %
EUR/USD	1.21	1.0 %	7.7 %
GBP/USD	1.34	0.3 %	1.4 %
USD/JPY	104.51	0.4 %	(3.8) %
USD/AUD	1.35	(0.1) %	(5.0) %
USD/SGD	1.34	0.0 %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	0.8 %	(25.4) %
Gold(INR/10g)	49,361	0.8 %	26.6 %
Gold Comex(USD/oz)	1,846	0.6 %	19.7 %
SILVER(INR/1Kg)	63,125	0.2 %	37.1 %
Aluminium(USD/MT)	2,028	(1.1) %	14.4 %
Copper(USD/MT)	7,679	0.8 %	24.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.9	(0.0) %	(1.0) %

Global Economy: The US ISM said its services PMI edged down to 55.9 in November after dipping to 56.6 in October, although a reading above 50 still indicates growth. The US Labor Department said initial jobless claims fell to 712,000, a decrease of 75,000 from the previous week's revised level of 787,000. China services sector continued to expand with a services PMI score of 57.8 in November, the latest survey from Caixin showed on Thursday. That's up from 56.8 in October, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Individually, there was a substantial rise in business activity amid the quickest increase in new work since 2010. Employment growth was also at its strongest in 10 years, as were input costs. The survey also showed that its composite index improved to 57.5 in November from 55.7 in October. The euro area private sector returned to the contraction zone in November due to a sharp fall in services activity amid the new restrictions to combat the second wave of coronavirus infections, final data from IHS Markit showed on Thursday. The final composite output index fell to 45.3 in November from 50.0 in October. The flash reading was 45.1. The decline was driven by the downturn in service sector activity which saw largest contraction since May. The services Purchasing Managers' Index decreased to 41.7 from 46.9 a month ago. According to flash survey, the score was 41.3. The manufacturing sector grew for the fifth month in a row though. Japan services sector continued to contract in November, with a services PMI score of 47.8, the latest survey from Jibun Bank showed on Thursday. That's up from 47.7 in October, although it remains beneath the boom-or-bust line of 50 that separates expansion from contraction. Individually, there was a softer fall in output, but incoming new business declined at a faster pace. The survey also showed that its composite index improved to 48.1 in November from 48.0 in October.

Global Equities: US stocks saw a steady outing as lawmakers resumed negotiations over a new fiscal stimulus bill.

Indian Economy: The seasonally adjusted India Services Business Activity Index fell to 53.7 in November from 54.1 in October. The Indian services economy remained on the right path to recovery during November. The Composite PMI Output Index was down to 56.3 in November from 58 in October. Indian private sector activity rose for the third straight month in November, but the pace of growth softened from October's near nine-year high. Rates of increase eased at manufacturers and service providers. The Ministry of Finance noted in its latest monthly report that the GDP growth estimates for Q2: 2020-21 reflect a faster recovery of the Indian economy subsequent to unlocking and supportive policy.

Equity Markets: Key equity benchmarks ended near the flat line with some positive bias on Thursday. The indices witnessed bouts of volatility on account of weekly index options expiry on the NSE today. While PSU banks, metals and auto shares advanced, private banks and IT stocks declined.

Corporate News: Banking stocks will be in focus as the Reserve Bank of India (RBI) Governor Shaktikanta Das will announce the policy decision of the Monetary Policy Committee at 10:00 IST, followed by a press conference at 12:00 IST. Granules India said the company received approval from US FDA for generic of Cuprimine, Penicillamine capsules. Bharti Airtel added 3.77 million new subscribers while Reliance Jio added 1.46 million new subscribers in September 2020. Vodafone Idea lost 4.65 million subscribers. MTNL and Reliance Communications lost 5,784 and 1,324 customers, respectively. Bharti Airtel has pipped Reliance Jio in new mobile subscriber addition in September after a gap of four years, according to TRAI data.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	22.2	251.7	140.7
MF(INR cr)	(786.5)	(786.5)	(417.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	79,023	72,586	57,767
F&O(INR cr)	4,924,537	3,190,567	1,980,908

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.9	21.3	29.6
NSE VIX	19.0	19.7	27.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,449	(0.0) %	61.7 %	Energy	16,941	1.4 %	57.3 %
IT	22,202	(0.5) %	84.3 %	Pharma	12,207	1.0 %	73.7 %
Metals	3,126	2.5 %	101.2 %	Finance	14,139	(0.3) %	58.1 %
Auto	9,245	1.7 %	98.5 %	PSU	1,673	4.8 %	30.4 %
FMCG	31,909	0.3 %	21.1 %	Real Estate	280	0.8 %	62.8 %

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>
Bank of Ba	58	7.8 %	13.8 %	L & T Info	3,301	(2.7) %	137.1 %
Maruti Suz	7,739	7.4 %	82.3 %	ICICI Lomb	1,482	(2.6) %	34.0 %
Bharti Inf	240	6.6 %	54.4 %	Bosch	13,007	(2.2) %	40.8 %
Punjab Nat	36	5.4 %	17.6 %	HDFC Bank	1,377	(2.1) %	66.0 %
SBI Cards	839	5.2 %	37.9 %	SBI Life I	858	(2.0) %	35.1 %

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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