



INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,128	0.0 %	9.6 %
BSE SENSEX	32,870	0.1 %	9.9 %
CNX BANK	25,075	0.0 %	16.4 %
CNX MIDCAP	19,750	0.0 %	13.9 %
CNX SMALLCAP	8,514	0.0 %	20.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,290	0.2 %	22.2 %
S&P 500	2,639	(0.1) %	16.9 %
FTSE 100	7,339	0.5 %	2.2 %
HANG SENG	29,138	0.2 %	31.5 %
NIKKEI	22,707	(0.5) %	15.9 %
SHANGHAI COMPOSITE	3,310	(0.2) %	5.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.38	(0.1) %	(4.5) %
EUR/USD	1.19	(0.3) %	12.0 %
GBP/USD	1.35	(0.5) %	9.5 %
USD/JPY	112.48	0.0 %	(3.0) %
USD/AUD	1.31	(1.0) %	(4.3) %
USD/SGD	1.35	(0.2) %	(5.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	1.7 %	11.5 %
Gold(INR/10g)	29,086	(0.3) %	4.6 %
Gold Comex(USD/oz)	1,283	0.4 %	10.9 %
SILVER(INR/1Kg)	37,619	(0.5) %	(3.3) %
Aluminium(USD/MT)	2,047	0.7 %	20.2 %
Copper(USD/MT)	6,734	(0.4) %	20.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	(0.1) %	(0.1) %

Global Economy: A report released by the Commerce Department on Monday showed a modest decrease in new orders for US manufactured goods in the month of October. The report said factory orders edged down by 0.1% in October after rising by 1.7% in September. Eurozone investor confidence declined in December on weak expectations, survey results from think tank Sentix showed. The investor sentiment index slipped to 31.1 from 34.0 in November. The score posted in November was the highest since July 2007. Assessment of current situation strengthened to the highest level in more than 10 years, while expectations weakened notably to a 4-month low in December.

Global Equities: Dow closed at a record as investors eyed the weekend passage of the Senate version of a sweeping overhaul of the US tax code. However, the S&P 500 and the Nasdaq declined.

Indian Economy: India's healthcare market may see threefold rise as its size in value terms is likely to reach \$372 billion (bn) by 2022 from the level of \$110 bn as of 2016 thereby clocking a compounded annual growth rate (CAGR) of 22 per cent, according to an ASSOCHAM-RNCOS joint paper. Growing incidence of lifestyle diseases, rising demand for affordable healthcare delivery systems due to increasing healthcare costs, technological advancements, emergence of telemedicine, rapid health insurance penetration, mergers and acquisitions helping to reach untapped markets and government initiatives like e-health together with tax benefits, incentives and a host of upcoming regulatory policies are driving healthcare market in India.

Equity Markets: Key benchmark indices closed with small gains after witnessing volatility in intraday trade. The Sensex and the Nifty, both, bounced back after hitting their lowest intraday levels in more than 2-1/2 weeks in early trade. Overall mood is mixed amid thin buying as recent volatility is curbing enthusiasm.

Corporate News: Global rating firm, Fitch, in its latest Global Economic Outlook has cut India's Gross Domestic Product (GDP) growth forecast for FY18 to 6.7% from the earlier projection of 6.9% in September, 2017 stating that the rebound in the economy was "weaker than expected". Fitch also cut the FY19 forecast to 7.3% from 7.4% earlier, according to media reports. Bank of Maharashtra will be in focus on fund-raising plans. The board of directors of the bank on Monday approved the opening of a qualified institutional placement (QIP) at a floor price of Rs 26.89 a share. Interest rate sensitive stocks will be in focus as the Reserve Bank of India's (RBI) monetary policy committee (MPC) will meet today, 5 December 2017 and tomorrow, 6 December 2017, for the fifth bi-monthly monetary policy decision for FY 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(93.6)	134.2	11.0
MF(INR cr)	299.6	561.5	598.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,473	30,676	32,041
F&O(INR cr)	385,866	413,579	610,784

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.4	11.4	10.9
NSE VIX	14.9	14.8	12.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,075	(0.5) %	16.4 %	Energy	13,902	(0.3) %	17.6 %
IT	11,082	1.2 %	4.6 %	Pharma	9,052	(0.4) %	(13.8) %
Metals	3,631	0.4 %	16.9 %	Finance	10,242	(0.1) %	16.0 %
Auto	11,160	(0.3) %	12.5 %	PSU	3,781	0.4 %	7.2 %
FMCG	25,758	0.4 %	9.0 %	Real Estate	318	(0.4) %	45.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
P & G Hygi	9,863	3.7 %	33.5 %	Ashok Leyl	116	(3.1) %	38.3 %
Avenue Sup	1,151	3.3 %	81.4 %	UPL	711	(2.6) %	(3.3) %
United Spi	3,310	3.1 %	61.7 %	Shriram Tr	1,294	(2.5) %	17.2 %
NMDC	133	2.9 %	(0.6) %	Glenmark P	541	(2.5) %	(36.9) %
Infosys	985	2.8 %	(2.3) %	Bharti Inf	377	(2.4) %	14.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Current Account Balance (Australian Dollar) (3Q)	05-12-2017	0:30	AUD	-	-
Net Exports of Gross Domestic Product (3Q)	05-12-2017	0:30	AUD	-	0.3
RBA Cash Rate Target (DEC 05)	05-12-2017	3:30	AUD	-	0.015
Retail Sales (MoM) (OCT)	05-12-2017	0:30	AUD	-	0
International Merchandise Trade (Canadian dollar) (OCT)	05-12-2017	13:30	CAD	-	-
Caixin China PMI Composite (NOV)	05-12-2017	1:45	CNY	-	51
Caixin China PMI Services (NOV)	05-12-2017	1:45	CNY	-	51.2
Euro-Zone Retail Sales (MoM) (OCT)	05-12-2017	10:00	EUR	-	0.007
Euro-Zone Retail Sales (YoY) (OCT)	05-12-2017	10:00	EUR	-	0.037
Markit Eurozone Composite PMI (NOV F)	05-12-2017	9:00	EUR	-	57.5
Markit Eurozone Services PMI (NOV F)	05-12-2017	9:00	EUR	-	56.2
Markit France Composite PMI (NOV F)	05-12-2017	8:50	EUR	-	60.1
Markit France Services PMI (NOV F)	05-12-2017	8:50	EUR	-	60.2
Markit Germany Services PMI (NOV F)	05-12-2017	8:55	EUR	-	54.9
Markit/ADACI Italy Composite PMI (NOV)	05-12-2017	8:45	EUR	-	53.9
Markit/ADACI Italy Services PMI (NOV)	05-12-2017	8:45	EUR	-	52.1
Markit/BME Germany Composite PMI (NOV F)	05-12-2017	8:55	EUR	-	57.6
BRC Sales Like-For-Like (YoY) (NOV)	05-12-2017	0:01	GBP	-	(0.01)
Markit/CIPS UK Composite PMI (NOV)	05-12-2017	9:30	GBP	-	55.8
Markit/CIPS UK Services PMI (NOV)	05-12-2017	9:30	GBP	-	55.6
New Car Registrations (YoY) (NOV)	05-12-2017	9:00	GBP	-	(0.122)
Official Reserves (Changes) (NOV)	05-12-2017	9:30	GBP	-	-
Nikkei Japan PMI Composite (NOV)	05-12-2017	0:30	JPY	-	53.4
Nikkei Japan PMI Services (NOV)	05-12-2017	0:30	JPY	-	53.4
ANZ Commodity Price (NOV)	05-12-2017	0:00	NZD	-	(0.003)
ANZ Job Advertisements (MoM) (NOV)	05-12-2017	21:00	NZD	-	0.009
ISM Non-Manufacturing/Services Composite (NOV)	05-12-2017	15:00	USD	-	60.1
Markit US Composite PMI (NOV F)	05-12-2017	14:45	USD	-	54.6
Markit US Services PMI (NOV F)	05-12-2017	14:45	USD	-	54.7



Trade Balance (OCT)	05-12-2017	13:30	USD	-	-
U.S. to Sell 4-Week Bills	05-12-2017	16:30	USD	-	-
U.S. to Sell USD20 Bln 52-Week Bills	05-12-2017	16:30	USD	-	-

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