



**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,820	(0.5) %	6.0 %
BSE SENSEX	36,134	(0.3) %	8.1 %
CNX BANK	26,572	(0.5) %	9.2 %
CNX MIDCAP	17,494	(0.5) %	(8.4) %
CNX SMALLCAP	6,236	(0.6) %	(21.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,027	(3.1) %	0.8 %
S&P 500	2,700	(3.2) %	0.2 %
FTSE 100	7,023	(0.6) %	(8.2) %
HANG SENG	27,260	0.3 %	(10.7) %
NIKKEI	22,036	(2.4) %	(6.3) %
SHANGHAI COMPOSITE	2,666	0.4 %	(20.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.50	1.3 %	10.7 %
EUR/USD	1.13	0.1 %	(5.6) %
GBP/USD	1.27	(0.3) %	(6.0) %
USD/JPY	112.95	(0.5) %	0.2 %
USD/AUD	1.37	(0.1) %	6.9 %
USD/SGD	1.37	(0.4) %	2.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.6 %	(11.8) %
Gold(INR/10g)	30,945	0.9 %	5.4 %
Gold Comex(USD/oz)	1,240	(0.0) %	(5.2) %
SILVER(INR/1Kg)	36,639	1.5 %	(5.1) %
Aluminium(USD/MT)	1,985	0.1 %	(12.0) %
Copper(USD/MT)	6,278	(0.5) %	(12.6) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.0) %	0.5 %

**Global Economy:** Eurozone producer prices rose 4.9% year-on-year after a revised 4.6% in September, figures from Eurostat showed Tuesday. Energy sector prices jumped 14.6%. On a month-on-month basis, producer prices increased 0.8% after a 0.6% gain in September. UK construction sector expanded at the fastest pace in four months in November, thanks to an increase in new work and consequent gains in job creation, survey data from IHS Markit showed. The construction Purchasing Managers' Index climbed to 53.4 from 53.2 in October. The UK construction sector expanded for an eight month in a row. Job growth was the fastest since December 2015. The Reserve Bank of Australia decided to keep its benchmark interest rate unchanged at a record low, citing sluggish wage growth and low inflation. The board of the Reserve Bank of Australia, governed by Philip Lowe, voted to maintain the cash rate at 1.50%. The interest rate has remained at the current level since August 2016.

**Global Equities:** Sentiments turned cautious after the solid response given to the weekend talks at G20 as traders were reluctant to push up their bets further.

**Indian Economy:** Government of India has announced the Sale (Re-issue) of (i) 8.24% Government Stock, 2027 for a notified amount of Rs 3,000 crore (nominal) through price based auction, (ii) 7.17% Government Stock, 2028 for a notified amount of Rs 4,000 crore (nominal) through price based auction, (iii) 7.50% Government Stock, 2034 for a notified amount of Rs 2,000 crore (nominal) through price based auction, and (iv) 7.72% Government Stock, 2055 for a notified amount of Rs 3,000 crore (nominal) through price based auction. Subject to the limit of Rs 12,000 crore, being total notified amount, Gol will have the option to retain additional subscription up to Rs 1,000 crore each against any one or more of the above securities.

**Equity Markets:** Local stocks eased yesterday. The key equities indices snapped six-day rising streak to end with modest losses due to profit selling. Weakness in HDFC twins and Reliance Industries put pressure on bourses. Gains in IT shares supported the indices at lower levels. The Sensex fell 106.69 points or 0.29% to settle at 36,134.31. The index rose 54.84 points, or 0.15% at the day's high of 36,295.84. The index fell 204.61 points, or 0.56% at the day's low of 36,036.39.

**Corporate News:** IT companies could see further gains following the latest slide in Indian Rupee. The rupee edged lower against the dollar. The partially convertible rupee closed around 70.50, almost flat on the day after the heavy losses on Monday. The INR had tested a four month high before easing. Lupin announced the launch of Silodosin Capsules 4mg and 8mg, having received an approval from the United States Food and Drug Administration (FDA) earlier. Cox & Kings owned MEININGER hotel group announced the signing of an agreement for a hotel in Reykjavik. The property is located on Vesturbaer district in Reykjavik, which is close to the city centre and the Harpa concert hall. The opening is scheduled for the second quarter of 2020. GE Power's Grid Solutions business announced the completion of a first-of- its-kind project for a 400/200 kV Gas Insulated Substation (GIS) at Magam village in the Baramulla block of north Kashmir. Alkem Laboratories announced that its manufacturing facility located at St. Louis, USA has received an Establishment Inspection Report (EIR) issue by the USFDA.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	23.1	23.1	(42.9)
MF(INR cr)	(760.3)	(760.3)	470.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,710	33,925	35,042
F&O(INR cr)	470,286	448,142	964,485

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.4	16.4	15.5
NSE VIX	18.1	18.2	14.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,694	(0.6) %	9.7 %	Energy	14,359	0.2 %	8.0 %
IT	15,000	1.8 %	18.0 %	Pharma	9,064	0.1 %	5.1 %
Metals	3,237	0.3 %	(8.6) %	Finance	11,351	(0.7) %	10.6 %
Auto	9,212	(0.5) %	(16.7) %	PSU	2,905	(1.3) %	1.8 %
FMCG	30,151	(0.7) %	13.8 %	Real Estate	237	(0.4) %	(20.1) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oracle Fin	3,563	3.8 %	(9.5) %	DLF	174	(3.7) %	(13.5) %
ICICI Lomb	887	3.3 %	13.1 %	Bosch	18,514	(3.6) %	(0.0) %
B P C L	334	3.0 %	(21.2) %	Colgate-Pa	1,234	(3.1) %	16.7 %
Indiabulls	804	2.6 %	(35.4) %	Sun Pharma	443	(2.7) %	(12.8) %
UPL	751	2.6 %	(0.1) %	M & M	740	(2.7) %	(1.0) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Gross Domestic Product (QoQ) (3Q)	05-12-2018	00:30	AUD	-	0.009
Gross Domestic Product (YoY) (3Q)	05-12-2018	00:30	AUD	-	0.034
Bank of Canada Rate Decision (DEC 5)	05-12-2018	15:00	CAD	-	0.0175
Caixin China PMI Composite (NOV)	05-12-2018	01:45	CNY	-	50.5
Caixin China PMI Services (NOV)	05-12-2018	01:45	CNY	-	50.8
Markit/ADACI Italy Composite PMI (NOV)	05-12-2018	08:45	EUR	-	49.3
Markit/ADACI Italy Services PMI (NOV)	05-12-2018	08:45	EUR	-	49.2
Markit France Composite PMI (NOV F)	05-12-2018	08:50	EUR	-	54
Markit France Services PMI (NOV F)	05-12-2018	08:50	EUR	-	55
Markit Germany Services PMI (NOV F)	05-12-2018	08:55	EUR	-	53.3
Markit/BME Germany Composite PMI (NOV F)	05-12-2018	08:55	EUR	-	52.2
Markit Eurozone Composite PMI (NOV F)	05-12-2018	09:00	EUR	-	52.4
Markit Eurozone Services PMI (NOV F)	05-12-2018	09:00	EUR	-	53.1
Euro-Zone Retail Sales (MoM) (OCT)	05-12-2018	10:00	EUR	-	0
Euro-Zone Retail Sales (YoY) (OCT)	05-12-2018	10:00	EUR	-	0.008
New Car Registrations (YoY) (NOV)	05-12-2018	09:00	GBP	-	(0.029)
Markit/CIPS UK Composite PMI (NOV)	05-12-2018	09:30	GBP	-	52.1
Markit/CIPS UK Services PMI (NOV)	05-12-2018	09:30	GBP	-	52.2
Official Reserves (Changes) (OCT)	05-12-2018	09:30	GBP	-	-
Nikkei Japan PMI Composite (NOV)	05-12-2018	00:30	JPY	-	52.5
Nikkei Japan PMI Services (NOV)	05-12-2018	00:30	JPY	-	52.4
BOJ Outright Bond Purchase 10~25 Years	05-12-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	05-12-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	05-12-2018	01:10	JPY	-	-
BOJ Wakatabe speaks in Niigata	05-12-2018	01:30	JPY	-	-
Foreign Buying Japan Bonds (NOV 30)	05-12-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (NOV 30)	05-12-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (NOV 30)	05-12-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (NOV 30)	05-12-2018	23:50	JPY	-	-



Consumer Confidence Index (NOV)	05-12-2018	14:00	MXN	-	103
ANZ Commodity Price (NOV)	05-12-2018	00:00	NZD	-	(0.024)
MBA Mortgage Applications (NOV 30)	05-12-2018	12:00	USD	-	0.055
ADP Employment Change (NOV)	05-12-2018	13:15	USD	-	-
Powell's JEC Testimony Released at 8:15 a.m.; Hearing at 10:15	05-12-2018	13:15	USD	-	-
Nonfarm Productivity (3Q F)	05-12-2018	13:30	USD	-	0.022
Unit Labor Costs (3Q F)	05-12-2018	13:30	USD	-	0.012
Markit US Composite PMI (NOV F)	05-12-2018	14:45	USD	-	54.4
Markit US Services PMI (NOV F)	05-12-2018	14:45	USD	-	54.4
ISM Non-Manufacturing/Services Composite (NOV)	05-12-2018	15:00	USD	-	60.3
DOE Cushing OK Crude Inventory (NOV 30)	05-12-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (NOV 30)	05-12-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (NOV 30)	05-12-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (NOV 30)	05-12-2018	15:30	USD	-	-
U.S. Federal Reserve Releases Beige Book	05-12-2018	19:00	USD	-	-
Quarles Speaks at Stanford on Banking in U.S. West	05-12-2018	22:15	USD	-	-

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