



05 Dec.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|----------|
| CNX NIFTY | 12,063 | 0.2 % | 3.4 % |
| BSE SENSEX | 40,850 | 0.4 % | 5.3 % |
| CNX BANK | 32,049 | 0.2 % | 5.7 % |
| CNX MIDCAP | 17,031 | 0.1 % | (7.1) % |
| CNX SMALLCAP | 5,753 | 0.2 % | (14.6) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 27,650 | 0.5 % | 18.5 % |
| S&P 500 | 3,113 | 0.6 % | 24.2 % |
| FTSE 100 | 7,189 | 0.4 % | 6.7 % |
| HANG SENG | 26,063 | (1.3) % | 3.7 % |
| NIKKEI | 23,135 | (1.1) % | 18.3 % |
| SHANGHAI COMPOSITE | 2,878 | (0.2) % | 16.7 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 71.43 | (0.1) % | 2.9 % |
| EUR/USD | 1.11 | 0.6 % | (3.2) % |
| GBP/USD | 1.31 | 1.0 % | 2.4 % |
| USD/JPY | 108.71 | (0.8) % | (0.8) % |
| USD/AUD | 1.46 | (1.2) % | 2.9 % |
| USD/SGD | 1.36 | (0.3) % | (0.1) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 58 | 4.2 % | 25.3 % |
| Gold(INR/10g) | 38,162 | 0.3 % | 21.0 % |
| Gold Comex(USD/oz) | 1,473 | (0.3) % | 14.1 % |
| SILVER(INR/1Kg) | 44,671 | 0.5 % | 16.7 % |
| Aluminium(USD/MT) | 1,771 | (1.7) % | (4.7) % |
| Copper(USD/MT) | 5,823 | 0.2 % | (0.3) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 1.8 | 0.1 % | (0.9) % |

Global Economy: The ISM said its US non-manufacturing index dipped to 53.9 in November after rising to 54.7 in October. China's private sector grew at the steepest pace in 21 months in November driven by the upturn in manufacturing and services, survey results from IHS Markit showed Wednesday. The Caixin composite output index rose to 53.2 in November from 52.0 in October. A reading above 50 indicates expansion. The services Purchasing Managers' Index advanced to a seven-month high of 53.5 from 51.1 in October. Euro area private sector growth remained the lowest in six-and-a-half years in November, signaling modest expansion for the fourth quarter, final survey data from IHS Markit showed Wednesday. The composite output index held steady at 50.6 in November. The reading was slightly above the flash estimate of 50.3. UK service sector contracted the most in eight months in November but the pace of decline was slower than initially estimated, survey results from IHS Markit and Chartered Institute of Procurement & Supply showed. The final services Purchasing Managers' Index fell to 49.3 in November from 50.0 in October. The reading was above the flash reading of 48.6. The services sector in Japan moved back into expansion in November as the latest survey from Jibun Bank showed on Wednesday with a PMI score of 50.3. That was up from 49.8. The composite index also moved up to 49.8 in November from 49.1 in October. Australia's gross domestic product gained a seasonally adjusted 0.4% on quarter in the third quarter of 2019. This marked a further drop from 0.6% reading in the previous quarter. On a yearly basis, gross domestic product climbed 1.7%, up from 1.4% in the three months prior.

Global Equities: US Stocks rose after media reports stated that China and US are working toward a phase one trade deal despite fears of fresh tensions. DOW added half a percent on the day.

Indian Economy: Cabinet Committee on Economic Affairs, chaired by Prime Minister Narendra Modi has given its approval for creation and launch of Bharat Bond Exchange Traded Fund (ETF) to create an additional source of funding for Central Public Sector Undertakings (CPSUs) Central Public Sector Enterprises (CPSEs), Central Public Financial Institutions (CPFIs) and other Government organizations. Bharat Bond ETF would be the first corporate Bond ETF in the country. Indian service providers signalled a moderate rebound in business activity during November, with the return to output growth accompanied by a renewed rise in new business intakes, faster job creation and strengthening business confidence. Meanwhile, pressures on operating margins intensified, with cost burdens increasing at a more marked pace than average selling prices. IHS Markit India Services Business Activity Index rises to 52.7 in November 2017 from 49.2 in October 2019. The index signalled output growth for the first time in three months.

Equity Markets: The Nifty 50 index snapped three-day losing streak on Wednesday. After slipping below 11,950, the Nifty reversed trend to end above 12,000 mark. Shares bounced back in late trade, boosted by news reports that the U.S. and China were edging closer to a trade deal. The barometer index, the BSE Sensex, rose 174.84 points or 0.43% to 40,850.29, as per the provisional closing data. The Nifty 50 index rose 43.10 points or 0.36% to 12,037.30, as per the provisional closing data.

Corporate News:

Reliance Industries said, its subsidiary Reliance Jio Infocomm (Jio) launched the "NEW ALL-IN-ONE PLANS". These plans will provide up to 300% more benefits to the Jio consumers, upholding the Jio promise of providing the best-quality service at the lowest price globally.

Vedanta said that Committee of Directors considered and approved offering for subscription, on a private placement basis, up to 30,000 nos. Secured, Rated, Non-Cumulative, Redeemable, Non-Convertible Debentures (NCDs) of face value Rs 10,00,000/- each aggregating up to Rs 3,000 crore (including the option to retain oversubscription of upto Rs



1,500 crore) in two series. HDFC Asset Management Company said, its promoter, Standard Life Investments has informed regarding its intention to exercise the Oversubscription Option in the Offer to the extent of 1,835,509 Equity shares. Accordingly, the aggregate number of Sale Shares will be up to 6,585,509 Equity Shares (representing 3.10% of the total issued and paid-up Equity Share capital of the Company).



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (14.4) | (108.1) | 38.3 |
| MF(INR cr) | 809.1 | 666.4 | 306.3 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 40,714 | 39,943 | 36,974 |
| F&O(INR cr) | 1,809,045 | 1,201,563 | 1,345,648 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0 | 17.0 | 16.0 |
| NSE VIX | 13.3 | 14.0 | 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 | 31,979 | 1.2 % | 5.5 % | Energy | 16,032 | (0.5) % | (3.0) % |
| IT | 15,175 | 1.7 % | (4.2) % | Pharma | 8,122 | 1.0 % | (13.4) % |
| Metals | 2,604 | 1.6 % | (16.1) % | Finance | 14,247 | 0.8 % | 14.0 % |
| Auto | 7,997 | 0.4 % | (5.0) % | PSU | 2,621 | 2.0 % | (22.6) % |
| FMCG | 30,706 | 0.1 % | 1.7 % | Real Estate | 285 | 0.2 % | 6.8 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Vodafone I | 8 | 9.9 % | (56.3) % | HDFC AMC | 3,342 | (2.9) % | 114.8 % |
| Tata Motor | 169 | 7.1 % | (9.6) % | Godrej Con | 696 | (2.8) % | 2.8 % |
| Yes Bank | 63 | 5.9 % | (77.2) % | Larsen & T | 1,285 | (2.1) % | (9.0) % |
| Tata Motor | 70 | 5.4 % | (23.9) % | Piramal En | 1,692 | (2.0) % | (37.2) % |
| NMDC | 113 | 4.9 % | 7.6 % | ICICI Lomb | 1,364 | (1.7) % | 34.3 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|--|-------------|------------------|---------------|---------------|-----------------------|
| Trade Balance (OCT) | 05-12-2019 | 6:00 | AUD | - | - |
| Bank of Canada's Tim Lane Gives Economic Progress Report | 05-12-2019 | 18:15 | CAD | - | - |
| International Merchandise Trade (Canadian dollar) (OCT) | 05-12-2019 | 19:00 | CAD | - | - |
| Bank of Canada Deputy Governor Tim Lane Press Conference | 05-12-2019 | 19:30 | CAD | - | - |
| Ivey Purchasing Managers Index s.a. (NOV) | 05-12-2019 | 20:30 | CAD | - | 48.2 |
| German Factory Orders n.s.a. (YoY) (OCT) | 05-12-2019 | 12:30 | EUR | - | (0.054) |
| Markit Germany Construction PMI (NOV) | 05-12-2019 | 14:00 | EUR | - | 51.5 |
| Euro-Zone Government Expenditure (QoQ) (3Q) | 05-12-2019 | 15:30 | EUR | - | 0.003 |
| New Car Registrations (YoY) (NOV) | 05-12-2019 | 14:30 | GBP | - | (0.067) |
| Foreign Buying Japan Bonds (NOV 29) | 05-12-2019 | 5:20 | JPY | - | - |
| BOJ Board Member Harada Speech in Oita | 05-12-2019 | 7:00 | JPY | - | - |
| Volume of All Buildings SA (QoQ) (3Q) | 05-12-2019 | 3:15 | NZD | - | (0.015) |
| RBNZ Announces Bank Capital Review Decisions | 05-12-2019 | 4:30 | NZD | - | - |
| Challenger Job Cuts (YoY) (NOV) | 05-12-2019 | 18:00 | USD | - | (0.335) |
| EIA Natural Gas Storage Change (NOV 29) | 05-12-2019 | 21:00 | USD | - | (28) |
| U.S. to Sell 4-Week Bills | 05-12-2019 | 22:00 | USD | - | - |

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