



06 Nov.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,524	0.0 %	3.1 %
BSE SENSEX	34,951	(0.2) %	5.1 %
CNX BANK	25,732	0.0 %	5.8 %
CNX MIDCAP	17,363	0.0 %	(9.1) %
CNX SMALLCAP	6,218	0.0 %	(21.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,462	0.8 %	2.6 %
S&P 500	2,738	0.6 %	1.6 %
FTSE 100	7,104	0.1 %	(7.1) %
HANG SENG	25,934	(2.1) %	(15.0) %
NIKKEI	21,899	(1.6) %	(6.8) %
SHANGHAI COMPOSITE	2,665	(0.4) %	(20.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.13	(0.4) %	14.8 %
EUR/USD	1.14	0.2 %	(5.0) %
GBP/USD	1.31	0.6 %	(3.4) %
USD/JPY	113.29	0.5 %	0.5 %
USD/AUD	1.39	(0.2) %	8.5 %
USD/SGD	1.37	(0.2) %	3.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(0.9) %	4.6 %
Gold(INR/10g)	31,757	0.6 %	8.2 %
Gold Comex(USD/oz)	1,234	0.0 %	(5.7) %
SILVER(INR/1Kg)	38,372	0.2 %	(0.6) %
Aluminium(USD/MT)	1,967	0.3 %	(12.8) %
Copper(USD/MT)	6,255	3.0 %	(12.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	0.1 %	0.8 %

**Global Economy:** The ISM said its US non-manufacturing index dipped to 60.3 in October after climbing to 61.6 in September, although a reading above 50 still indicates growth in the service sector. China's private sector expanded at the weakest pace in more than two years in October with both services and manufacturing noting weaker performances, survey results from IHS Markit showed Monday. The Caixin composite output index fell to a 28-month low of 50.5 in October from 52.1 in September. Service sector activity rose only marginally, with the Caixin services Purchasing Managers' Index fell to a 13-month low of 50.8. The manufacturing production stagnated, following increases in each of the preceding 27 months. Eurozone Sentix investor confidence indicator dropped to 8.8 from 11.4 in October. The latest reading was the lowest since October 2016. The UK Purchasing Managers' Index also dropped more-than-expected to 52.2 in October from 53.9 in September.

**Global Equities:** Broad global trade concerns clubbed with continued pressure on commodity prices are making the overall sentiments rusty after gains in equities at the start of this month.

**Indian Economy:** Nikkei India Services Business Activity Index pointed to a stronger improvement in India's service sector, with an accelerated upturn in new work underpinning quicker rises in activity and jobs. Cost inflationary pressures eased, resulting in a softer increase in selling prices. Meanwhile, business sentiment remained positive, but was hampered by political uncertainty. At 52.2 in October, the seasonally adjusted Nikkei India Services Business Activity Index posted in expansion territory for the fifth straight month. Moreover, rising from 50.9 in September, the latest figure pointed to the quickest rate of growth since July. According to panellists, improved order flows supported the pick-up in output.

**Equity Markets:** Key equity indices settled with modest losses on first trading day of the week due to negative Asian stocks and as some profit selling emerged after recent uptick. Key barometers remained in negative zone for majority of the session. The Sensex settled below the psychological 35,000 level.

**Corporate News:** The largest domestic lender by assets State Bank of India (SBI) on Monday posted a 40.26% year-on-year fall in standalone profit at Rs 944.87 crore for Q2 September 2018. Asset quality improved with a percentage of gross non-performing assets (GNPA) decreasing to 9.95% over 10.69% a year ago. Percentage of net NPAs also improved to 4.84% from 5.29% during the same period. Slippages stood at Rs 10,888 crore in Q2FY19 over Rs 14,349 crore in Q1FY19 and Rs 32,821 crore in Q4FY18. GAIL (India) said its net profit rose 49.89% to Rs 1962.96 crore on 55.33% increase in revenue from operations to Rs 19275.32 crore in Q2 September 2018 over Q2 September 2017. Cipla said that its consolidated net profit fell 15.64% to Rs 366.91 crore on 1.01% decline in net sales to Rs 3947.93 crore in Q2 September 2018 over Q2 September 2017. Avenue Supermarts announced that the company has issued commercial paper of Rs 100 crore with effect from 05 November 2018. The Maturity Date is 04.02.2019 while the ratings assigned are CRISIL A1+. Natco Pharma announced that its Board of directors have approved buy-back of fully paid equity shares of Face value Rs 2 each at a price not exceeding Rs 1000 equity share for an aggregate amount not exceeding Rs 2500 Mn through open market route. IT stocks could be supported following the weakness in Indian Rupee. The rupee edged lower against the dollar. The partially convertible rupee slipped to at 73.12, compared with its close of 72.45 during the previous trading session.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(18.6)	54.4	(53.2)
MF(INR cr)	648.7	110.3	505.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	3,096	30,616	35,376
F&O(INR cr)	691,107	1,070,019	973,506

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.5	19.4	15.0
NSE VIX	19.5	19.0	14.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,732	0.1 %	5.8 %	Energy	13,986	(0.1) %	5.2 %
IT	14,472	0.5 %	13.9 %	Pharma	9,461	(0.9) %	9.7 %
Metals	3,442	0.1 %	(2.8) %	Finance	10,840	(0.2) %	5.6 %
Auto	9,154	(0.3) %	(17.2) %	PSU	3,008	2.9 %	5.4 %
FMCG	28,725	(0.4) %	8.4 %	Real Estate	225	1.5 %	(24.2) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Pidilite I	1,032	4.3 %	9.6 %	Cipla	563	(7.3) %	(2.3) %
St Bk of I	295	3.4 %	19.8 %	Sun TV Net	618	(6.8) %	(28.1) %
HDFC Stand	399	3.2 %	(17.3) %	I O C L	140	(5.4) %	(17.7) %
Vodafone I	42	2.8 %	(46.3) %	S A I L	67	(4.4) %	(9.0) %
United Spi	632	2.8 %	(3.3) %	Indiabulls	834	(4.2) %	(32.9) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (OCT)	06-11-2018	21:30	AUD	-	49.3
RBA Cash Rate Target (NOV 6)	06-11-2018	3:30	AUD	-	0.015
Building Permits (MoM) (SEP)	06-11-2018	13:30	CAD	-	0.004
Euro-Zone Producer Price Index (MoM) (SEP)	06-11-2018	10:00	EUR	-	0.003
Euro-Zone Producer Price Index (YoY) (SEP)	06-11-2018	10:00	EUR	-	0.042
ECB's Coeure Is Chairing a Panel in Brussels	06-11-2018	11:15	EUR	-	-
ECB's Lautenschlaeger Speaks in Frankfurt	06-11-2018	12:00	EUR	-	-
German Factory Orders (MoM) (SEP)	06-11-2018	7:00	EUR	-	0.02
German Factory Orders n.s.a. (YoY) (SEP)	06-11-2018	7:00	EUR	-	(0.021)
ECB's Praet is Chairing a Panel in Brussels	06-11-2018	7:30	EUR	-	-
Markit/ADACI Italy Composite PMI (OCT)	06-11-2018	8:45	EUR	-	52.4
Markit/ADACI Italy Services PMI (OCT)	06-11-2018	8:45	EUR	-	53.3
Markit France Composite PMI (OCT F)	06-11-2018	8:50	EUR	-	54.3
Markit France Services PMI (OCT F)	06-11-2018	8:50	EUR	-	55.6
Markit Germany Services PMI (OCT F)	06-11-2018	8:55	EUR	-	53.6
Markit/BME Germany Composite PMI (OCT F)	06-11-2018	8:55	EUR	-	52.7
Markit Eurozone Composite PMI (OCT F)	06-11-2018	9:00	EUR	-	52.7
Markit Eurozone Services PMI (OCT F)	06-11-2018	9:00	EUR	-	53.3
BRC Sales Like-For-Like (YoY) (OCT)	06-11-2018	0:01	GBP	-	(0.002)
Official Reserve Assets (OCT)	06-11-2018	23:50	JPY	-	-
Consumer Confidence Index (OCT)	06-11-2018	14:00	MXN	-	101.7
Average Hourly Earnings (QoQ) (3Q)	06-11-2018	21:45	NZD	-	0.002
Employment Change (QoQ) (3Q)	06-11-2018	21:45	NZD	-	0.005
Employment Change (YoY) (3Q)	06-11-2018	21:45	NZD	-	0.037
Labor Cost Private Sector (QoQ) (3Q)	06-11-2018	21:45	NZD	-	0.006
Participation Rate (3Q)	06-11-2018	21:45	NZD	-	0.709
Private Wages ex Overtime (QoQ) (3Q)	06-11-2018	21:45	NZD	-	0.006
Unemployment Rate (3Q)	06-11-2018	21:45	NZD	-	0.045
U.S. Trade Deficit (SEP)	06-11-2018	15:00	USD	-	71.2



U.S. to Sell 8-Week Bills	06-11-2018	16:30	USD	-	-
U.S. to Sell USD26 Bln 52-Week Bills	06-11-2018	16:30	USD	-	-
U.S. to Sell USD27 Bln 10-Year Notes	06-11-2018	18:00	USD	-	-

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