



06 Nov.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,917	0.0 %	2.1 %
BSE SENSEX	40,248	(0.1) %	3.1 %
CNX BANK	30,220	0.0 %	(0.4) %
CNX MIDCAP	16,682	0.0 %	(9.0) %
CNX SMALLCAP	5,749	0.0 %	(14.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,493	0.1 %	17.9 %
S&P 500	3,075	(0.1) %	22.6 %
FTSE 100	7,388	0.3 %	9.7 %
HANG SENG	27,683	0.5 %	10.2 %
NIKKEI	23,252	1.8 %	18.9 %
SHANGHAI COMPOSITE	2,992	0.5 %	21.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.46	(0.3) %	1.5 %
EUR/USD	1.11	(0.5) %	(3.0) %
GBP/USD	1.29	(0.4) %	1.1 %
USD/JPY	108.94	0.6 %	(0.6) %
USD/AUD	1.45	0.1 %	2.0 %
USD/SGD	1.36	(0.2) %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.8 %	23.0 %
Gold(INR/10g)	38,565	(0.3) %	22.3 %
Gold Comex(USD/oz)	1,488	(1.4) %	15.3 %
SILVER(INR/1Kg)	46,503	(0.5) %	21.5 %
Aluminium(USD/MT)	1,814	1.5 %	(2.4) %
Copper(USD/MT)	5,880	0.6 %	0.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.9	0.1 %	(0.8) %

Global Economy: The US ISM said its non-manufacturing index climbed to 54.7 in October from 52.6 in September, with a reading above 50 indicating growth in the service sector. The US Commerce Department said the trade deficit narrowed to \$52.5 billion in September from a revised \$55.0 billion in August. China's central bank lowered its medium term lending rate for the first time since 2016 as the economy grew at the slowest pace in nearly three decades. The People's Bank of China on Tuesday reduced the rate on its one year medium-term lending facility by 5 basis points to 3.25% from 3.3%. China's private sector expanded at a slightly faster pace in October, survey data from IHS Markit showed Tuesday. The Caixin composite output index rose to 52.0 in October from 51.9 in September. A score above 50 indicates expansion in the sector. Eurozone's producer prices declined for the second straight month in September to the lowest level in three years, data from Eurostat showed on Tuesday. The producer price index fell 1.2% year-on-year in September, following a 0.8% drop in August. UK service sector showed no change in output in October though the overall activity improved slightly, survey data from IHS Markit showed Tuesday. The services Purchasing Managers' Index rose to 50.0 in October from 49.5 in September. Australia's central bank maintained its key interest rate, on Tuesday, after cutting the rate by a quarter basis points in October. The board of the Reserve Bank of Australia, governed by Philip Lowe, decided to leave the cash rate unchanged at a record 0.75%.

Global Equities: Global markets edged up. Trump and Xi are expected to meet in the U.S. soon to sign the first phase of a trade deal between the world's two largest economies.

Indian Economy: India's services sector contracted for a second consecutive month in October, due to muted demand, a private business survey showed on Tuesday, driving business optimism to a near-three year low. The Nikkei/IHS Markit Services Purchasing Managers' Index edged up to 49.2 last month from 48.7 in September, but it continued to remain below the 50-mark threshold separating contraction from growth on a monthly basis. Total sugar production in the country in the current sugar season is expected to be around 260 lakh tonnes; down around 20% than the 2019-20 seasons' 331.61 lakh tonnes, Indian Sugar Mills Association (ISMA) said a statement on Tuesday. Considering the estimates of sugarcane acreage, yields, recovery, cane drawal, rainfall and other relevant factors, ISMA has now estimated the total cane acreage at 48.31 lakh hectares (ha), which is about 12% less than 2018-19 SS on pan India basis of 55.02 lakh ha.

Equity Markets: Key equity indices declined on Tuesday, as investors locked profits after seven-day rising streak. The barometer index, the BSE Sensex fell 53.73 points or 0.13% to close at a 40,248.23, as per the provisional closing data. The Nifty 50 index fell 22.70 points or 0.19% to 11,918.60, as per the provisional closing data.

Corporate News: Titan Company reported 1.02% fall in consolidated net profit to Rs 302.79 crore on 1.74% rise in net sales to Rs 4600.71 crore in Q2 September 2019 over Q2 September 2018. Revenue growth during the quarter was impacted substantially by the decline in the revenues of the jewellery division due to the sudden spike in gold prices in June 2019. Tech Mahindra reported 17.2% rise in consolidated profit after tax to Rs 1124 crore on a 4.8% rise in revenue to Rs 9070 crore in Q2 September 2019 over Q1 June 2019. EBITDA rose 14.2% to Rs 1501 crore while the EBITDA margins rose by 130 bps to 16.5% in Q2 September 2019 over Q1 June 2019. The Board of Directors of Hero MotoCorp has considered and approved an investment of upto Rs 450 crore in its associate company, Hero FinCorp (HFCL) by subscribing to the issue of shares by way of private placement in one or more tranches. Sun Pharmaceutical Industries and its subsidiaries and/or associate companies announced that it has entered into a licensing agreement with AstraZeneca UK (AstraZeneca) to introduce certain novel ready-to-use (RTU) infusion oncology products in China. The agreement will help to bring cost-effective and quality drugs to patients in China.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	255.0	255.0	25.3
MF(INR cr)	(559.4)	(559.4)	372.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	41,263	43,389	36,016
F&O(INR cr)	926,574	787,613	1,335,580

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.9	18.0	15.8
NSE VIX	15.9	15.9	17.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,220	(0.4) %	(0.4) %	Energy	16,275	(0.6) %	(1.6) %
IT	15,533	(0.4) %	(1.9) %	Pharma	7,880	(1.1) %	(16.0) %
Metals	2,617	(1.0) %	(15.6) %	Finance	13,669	(0.0) %	9.4 %
Auto	8,256	(0.3) %	(1.9) %	PSU	2,539	(0.8) %	(25.0) %
FMCG	32,361	0.3 %	7.2 %	Real Estate	268	(0.7) %	0.2 %

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>
Dabur Indi	481	4.6 %	20.1 %	Vodafone I	4	(6.7) %	(76.3) %
Bharti Inf	222	3.4 %	(29.3) %	Punjab Nat	65	(5.1) %	(33.6) %
Yes Bank	68	3.3 %	(75.2) %	General In	280	(4.4) %	13.8 %
Indiabulls	225	2.9 %	(73.4) %	Zee Entert	286	(3.4) %	(33.7) %
Bajaj Fin.	4,228	2.8 %	40.9 %	New India	156	(3.3) %	(17.5) %

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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