



**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,783	0.0 %	5.6 %
BSE SENSEX	35,884	(0.7) %	8.0 %
CNX BANK	26,520	0.0 %	9.0 %
CNX MIDCAP	17,331	0.0 %	(9.2) %
CNX SMALLCAP	6,161	0.0 %	(22.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,027	(3.1) %	0.8 %
S&P 500	2,700	(3.2) %	0.2 %
FTSE 100	6,922	(1.4) %	(9.5) %
HANG SENG	26,820	(1.6) %	(12.1) %
NIKKEI	21,919	(0.5) %	(6.8) %
SHANGHAI COMPOSITE	2,650	(0.6) %	(20.9) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.47	0.0 %	10.7 %
EUR/USD	1.13	(0.1) %	(5.5) %
GBP/USD	1.27	(0.0) %	(5.8) %
USD/JPY	112.80	(0.5) %	0.1 %
USD/AUD	1.38	1.7 %	8.2 %
USD/SGD	1.37	0.2 %	2.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.6 %	(11.8) %
Gold(INR/10g)	30,855	(0.3) %	5.1 %
Gold Comex(USD/oz)	1,240	(0.0) %	(5.2) %
SILVER(INR/1Kg)	36,400	(0.7) %	(5.7) %
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:** The services sector in China continued to expand in November, and at a greatly accelerated rate, the latest survey from Caixin revealed on Wednesday with a PMI score of 53.8. Also, the composite PMI rose to 51.9 in November, up from 50.5 a month earlier. Eurozone's private sector growth was the lowest in more than two years during November, led by Germany, though the pace of slowdown was less than what was estimated initially. The final Eurozone composite PMI fell to 52.7 from October's 53.1, survey data from IHS Markit showed on Wednesday. The figure was slightly higher than the flash estimate of 52.4. The CIPS UK Services PMI, eased to 50.4 from 52.2 in October, marking the lowest level since July 2016, survey results from IHS Markit showed.

**Global Equities:** European stocks endured heavy losses on Wednesday afternoon, as resurgent trade worries worsened investor fears about global economic outlook.

**Indian Economy:** The Monetary Policy Committee (MPC) of the Reserve Bank of India has decided to keep the policy repo rate under the liquidity adjustment facility (LAF) unchanged at 6.5%. Consequently, the reverse repo rate under the LAF remains at 6.25%, and the marginal standing facility (MSF) rate and the Bank Rate at 6.75%. The decision of the MPC is consistent with the stance of calibrated tightening of monetary policy in consonance with the objective of achieving the medium-term target for consumer price index (CPI) inflation of 4% within a band of +/- 2%, while supporting growth. The main considerations underlying the decision are set out in the statement below. Inflation projection is lowered to 2.7-3.2% in H2:2018-19 and placed at 3.8-4.2% in H1:2019-20, with risks tilted to the upside.

**Equity Markets:** The market ended the volatile trading session with modest losses. Global stocks dropped as resurgent trade worries worsened investor fears about global economic growth. Volatility rose in late trade after the Reserve Bank of India (RBI) announced monetary policy. The Sensex fell 249.90 points or 0.69% to settle at 35,884.41, its lowest closing level since 28 November 2018. The index fell 85.66 points, or 0.24% at the day's high of 36,048.65. The index fell 356.50 points, or 0.99% at the day's low of 35,777.81.

**Corporate News:** Power Grid Corporation bagged a project to set up a transmission system for evacuating electricity from the 1,320 MW Jawaharpur thermal power project and to construct a substation in Uttar Pradesh. The Nikkei India Composite purchasing managers' index rose to 54.5 in November from 53 in October, marking the strongest print since October 2016. A reading above 50 suggests growth in the private sector. Growth was stronger in manufacturing than in services. The Nikkei India Services PMI surged to 53.7 from October's 52.2. The reading was the strongest since July. REC recorded a 25% jump in standalone net profit at Rs 1764.33 crore for the September quarter, mainly due to higher revenues.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	3.9	13.5	(42.6)
MF(INR cr)	0.0	(332.8)	463.3

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,890	33,247	35,023
F&O(INR cr)	746,752	547,679	963,189

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.7	18.6	15.5
NSE VIX	18.4	18.2	14.9

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,520	(0.7) %	9.0 %	Energy	14,294	(0.5) %	7.5 %
IT	15,013	0.1 %	18.1 %	Pharma	8,812	(2.8) %	2.2 %
Metals	3,120	(3.6) %	(11.9) %	Finance	11,317	(0.3) %	10.3 %
Auto	8,993	(2.4) %	(18.7) %	PSU	2,880	(0.9) %	0.9 %
FMCG	29,936	(0.7) %	13.0 %	Real Estate	235	(0.8) %	(20.7) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Hind. Unil	1,848	2.2 %	36.8 %	Sun Pharma	413	(6.8) %	(18.7) %
DLF	177	1.8 %	(11.9) %	B H E L	66	(5.7) %	(19.4) %
H D F C	1,973	1.7 %	7.4 %	Motherson	158	(5.7) %	(26.9) %
Cadila Hea	358	1.5 %	(6.9) %	Hindalco I	221	(5.1) %	4.8 %
HCL Techno	1,051	1.4 %	7.3 %	S A I L	53	(4.6) %	(27.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (OCT)	06-12-2018	00:30	AUD	-	0.002
Trade Balance (OCT)	06-12-2018	00:30	AUD	-	-
RBA's DeBelle gives speech in Sydney	06-12-2018	09:05	AUD	-	-
AiG Performance of Construction Index (NOV)	06-12-2018	21:30	AUD	-	46.4
International Merchandise Trade (Canadian dollar) (OCT)	06-12-2018	13:30	CAD	-	-
Ivey Purchasing Managers Index s.a. (NOV)	06-12-2018	15:00	CAD	-	61.8
German Factory Orders (MoM) (OCT)	06-12-2018	07:00	EUR	-	0.003
German Factory Orders n.s.a. (YoY) (OCT)	06-12-2018	07:00	EUR	-	(0.022)
ECB's Guindos Speaks in Frankfurt	06-12-2018	07:30	EUR	-	-
Markit Germany Construction PMI (NOV)	06-12-2018	08:30	EUR	-	49.8
BOE's Ramsden Speaks in London	06-12-2018	10:00	GBP	-	-
Overall Household Spending (YoY) (OCT)	06-12-2018	23:30	JPY	-	(0.016)
Challenger Job Cuts (YoY) (NOV)	06-12-2018	12:30	USD	-	1.536
Continuing Claims (NOV 24)	06-12-2018	13:30	USD	-	-
Initial Jobless Claims (DEC 1)	06-12-2018	13:30	USD	-	-
Trade Balance (OCT)	06-12-2018	13:30	USD	-	-
Cap Goods Orders Nondef Ex Air (OCT F)	06-12-2018	15:00	USD	-	0
Cap Goods Ship Nondef Ex Air (OCT F)	06-12-2018	15:00	USD	-	0.003
Durable Goods Orders (OCT F)	06-12-2018	15:00	USD	-	(0.044)
Durables Ex Transportation (OCT F)	06-12-2018	15:00	USD	-	0.001
Factory Orders (OCT)	06-12-2018	15:00	USD	-	0.007
Factory Orders Ex Trans (OCT)	06-12-2018	15:00	USD	-	0.004
EIA Natural Gas Storage Change (NOV 30)	06-12-2018	15:30	USD	-	(59)
EIA Working Natural Gas Implied Flow (NOV 30)	06-12-2018	15:30	USD	-	(59)
U.S. to Sell 4-Week Bills	06-12-2018	16:30	USD	-	-
U.S. to Sell 8-Week Bills	06-12-2018	16:30	USD	-	-
Household Change in Net Worth (3Q)	06-12-2018	17:00	USD	-	-
Fed's Bostic Speaks on the U.S. Economic Outlook	06-12-2018	17:15	USD	-	-
Fed's Williams Holds Discussion With Members King in NY	06-12-2018	22:30	USD	-	-



Powell Gives Brief Welcome Remarks at Housing Conference 06-12-2018

23:45

USD

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