



INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,037	0.2 %	3.1 %
BSE SENSEX	40,780	(0.2) %	5.2 %
CNX BANK	31,848	0.4 %	5.0 %
CNX MIDCAP	17,012	0.2 %	(7.2) %
CNX SMALLCAP	5,766	0.2 %	(14.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,678	0.1 %	18.6 %
S&P 500	3,117	0.2 %	24.4 %
FTSE 100	7,138	(0.7) %	6.0 %
HANG SENG	26,217	0.6 %	4.3 %
NIKKEI	23,300	0.7 %	19.1 %
SHANGHAI COMPOSITE	2,899	0.7 %	17.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.18	(0.5) %	2.5 %
EUR/USD	1.11	0.7 %	(3.1) %
GBP/USD	1.31	1.6 %	3.1 %
USD/JPY	108.83	(0.7) %	(0.7) %
USD/AUD	1.46	(1.1) %	3.0 %
USD/SGD	1.36	(0.5) %	(0.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.2 %	25.5 %
Gold(INR/10g)	38,042	(0.3) %	20.6 %
Gold Comex(USD/oz)	1,475	0.1 %	14.3 %
SILVER(INR/1Kg)	43,892	(1.7) %	14.7 %
Aluminium(USD/MT)	1,756	(0.8) %	(5.5) %
Copper(USD/MT)	5,855	0.5 %	0.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	0.0 %	(0.8) %

Global Economy: The US Commerce Department said factory orders rose by 0.3% in October after falling by a revised 0.8% in September. Eurozone economy grew as initially estimated in the third quarter, revised data from Eurostat showed Thursday. Gross domestic product grew 0.2% from the second quarter, when the economy expanded at the same rate. The figure matched the estimate published on November 14. On a yearly basis, GDP growth came in at 1.2%, in line with the previous estimate and the second quarter growth. Eurozone retail sales declined for the second straight month in October, data from Eurostat showed Thursday. Retail sales decreased 0.6% month-on-month in October, bigger than the 0.2% fall in September and the expected drop of 0.5%. Germany's factory orders fell a seasonally and calendar adjusted 0.4% month-on-month in October following a 1.5% increase in September, which was revised from the initially reported 1.3% gain, preliminary figures from the Federal Statistical Office showed on Thursday. Domestic orders dropped 3.2%, while foreign demand grew 1.5%. UK car sales decreased 1.3% on a yearly basis to 156,621 units in November, as weak business and consumer confidence along with economic uncertainty weighed on demand, data published by the Society of Motor Manufacturers and Traders, or SMMT, showed Thursday. The decline was driven primarily by a 6.1% fall in private registrations and a 3.2% drop in the business market. Australia's trade surplus decreased to A\$4.5 billion in October from A\$6.84 billion in September, according to the Australian Bureau of Statistics. Exports of goods and services decreased A\$2.2 billion to A\$40.75 billion. Meanwhile, imports rose slightly by A\$140 million to A\$36.25 billion.

Global Equities: US stocks saw choppy moves ahead of the release of the Labor Department's closely watched nonfarm payrolls report on Friday.

Indian Economy: Monetary Policy Committee (MPC) of the Reserve Bank of India decided to keep the policy repo rate under the liquidity adjustment facility (LAF) unchanged at 5.15%. Consequently, the reverse repo rate under the LAF remains unchanged at 4.90%, and the marginal standing facility (MSF) rate and the Bank Rate at 5.40%. These decisions are 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, RBI noted. Monetary Policy Committee (MPC) decided to continue with the accommodative stance as long as it is necessary to revive growth.

Equity Markets: Local stock market ended lower after a volatile session on Thursday. Shares swayed between gains and losses after RBI's surprise move of keeping the rate unchanged today. Banking stocks came under pressure. Volatility was also triggered by weekly expiry of index options.

Corporate News: M&M said the company acquired 36.63% of the Equity Share Capital of Meru in the first tranche of investment. Consequently, Meru has become a subsidiary of the Company with effect from 5 December, 2019. Allcargo Logistics said Directors have approved the Share Purchase Agreement between the Company and some of the existing members of the Promoter and Promoter Group of Gati Limited for acquisition upto 1,03,85,332 Equity Shares at a price of Rs 75/- per Equity Share. Bank of Baroda said Capital Raising Committee of Bank approved issuance of Basel III Compliant Additional Tier I Bonds for aggregate total issue size not exceeding Rs 1,850 crore, with a base issue size of Rs 500 crore and a Green Shoe Option to retain oversubscription up to Rs.1 ,350 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	27.2	(63.0)	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)	38,193	39,505	36,981
F&O(INR cr)	3,097,947	1,675,659	1,356,204

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	16.1
NSE VIX	14.3	14.1	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	31,713	(0.8) %	4.6 %	Energy	15,930	(0.6) %	(3.6) %
IT	15,368	1.3 %	(3.0) %	Pharma	8,052	(0.9) %	(14.1) %
Metals	2,544	(2.3) %	(18.0) %	Finance	14,194	(0.4) %	13.6 %
Auto	7,942	(0.7) %	(5.6) %	PSU	2,574	(1.8) %	(24.0) %
FMCG	30,795	0.3 %	2.0 %	Real Estate	286	0.2 %	7.0 %

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>
Zee Entert	300	6.6 %	(30.5) %	Interglobe	1,321	(6.0) %	(6.7) %
Container	568	2.1 %	6.9 %	Vodafone I	7	(5.8) %	(58.9) %
TCS	2,121	2.1 %	4.4 %	HDFC AMC	3,201	(4.2) %	105.7 %
Dabur Indi	466	1.8 %	16.2 %	Godrej Con	672	(3.4) %	(0.8) %
Shriram Tr	1,109	1.8 %	(10.3) %	NMDC	110	(3.3) %	4.1 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Foreign Reserves (Australian dollar) (NOV)	06-12-2019	11:00	AUD	-	-
AiG Performance of Construction Index (NOV)	06-12-2019	3:00	AUD	-	43.9
Net Change in Employment (NOV)	06-12-2019	19:00	CAD	-	-
Foreign Currency Reserves (NOV)	06-12-2019	13:30	CHF	-	-
German Industrial Production n.s.a. and w.d.a. (YoY) (OCT)	06-12-2019	12:30	EUR	-	(0.043)
Labor Cash Earnings (YoY) (OCT)	06-12-2019	5:00	JPY	-	0.008
U. of Mich. Sentiment (DEC P)	06-12-2019	20:30	USD	-	96.8
Baker Hughes U.S. Rig Count (DEC 6)	06-12-2019	23:30	USD	-	802

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