



**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,645	0.4 %	4.2 %
BSE SENSEX	35,312	(1.6) %	6.6 %
CNX BANK	26,307	0.4 %	8.1 %
CNX MIDCAP	17,116	0.4 %	(10.4) %
CNX SMALLCAP	6,078	0.4 %	(23.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,948	(0.3) %	0.5 %
S&P 500	2,696	(0.2) %	0.0 %
FTSE 100	6,704	(3.2) %	(12.3) %
HANG SENG	26,156	(2.5) %	(14.3) %
NIKKEI	21,502	(1.9) %	(8.5) %
SHANGHAI COMPOSITE	2,605	(1.7) %	(22.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.90	0.6 %	11.4 %
EUR/USD	1.14	0.4 %	(5.3) %
GBP/USD	1.28	0.5 %	(5.5) %
USD/JPY	112.71	(0.2) %	(0.0) %
USD/AUD	1.38	1.2 %	8.3 %
USD/SGD	1.37	0.2 %	2.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(0.7) %	(12.4) %
Gold(INR/10g)	30,987	0.4 %	5.5 %
Gold Comex(USD/oz)	1,245	0.4 %	(4.8) %
SILVER(INR/1Kg)	36,308	(0.3) %	(5.9) %
Aluminium(USD/MT)	1,967	(0.9) %	(12.8) %
Copper(USD/MT)	6,162	(1.8) %	(14.2) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.0) %	0.4 %

**Global Economy:** The US Commerce Department said factory orders tumbled by 2.1% in October after rising by a downwardly revised 0.2% in September. The ISM said its US non-manufacturing index rose to 60.7 in November after pulling back to 60.3 in October. The US trade deficit widened to a ten-year high in the month of October. The Commerce Department said the trade deficit widened to \$55.5 billion. ADP said the US private sector employment edged up by 179,000 jobs in November after jumping by a downwardly revised 225,000 jobs in October. All countries will lose out in a global trade war, Roberto Azevedo, the head of the world's trade referee had warned in a speech. Azevedo, acknowledged that reforms are needed, but rejected criticism that trade is the main cause for job losses. He welcomed the commitment by the Group of 20 over the weekend in Buenos Aires to reform the WTO to better preside over the modern trading system. Germany's manufacturing orders increased for a third straight month in October, preliminary data from the Federal Statistical Office showed on Thursday. Factory orders grew 0.3% following a 0.1% increase in previous month. Domestic orders dropped 3.2% while foreign orders rose 2.9%. Demand from Eurozone increased 7.3% and orders from others countries rose 0.3%. However, on a year-on-year basis, factory orders dropped 2.7% in October following a 2.2% decline in September.

**Global Equities:** Stocks stayed in broad a downward rage amid persistent concerns over global trade. Consistent selling pressure on industrial commodities also hurt the mood.

**Indian Economy:** Rating agency Fitch said India's economic growth will lose steam ahead of the general elections in 2019. Fitch said the country's gross domestic product (GDP) will expand 7.2% in 2018-19 while the growth in 2019-20 is forecast to be further lower, at 7%. The GDP growth prediction for 2020-21 is pegged at 7.1%. Fitch Ratings has also projected the rupee to fall to 75 to a dollar by the end of 2019 due to widening of current account deficit and tighter global financing. The private equity (PE)/ venture capital (VC) investments between January to November 2018 aggregates to \$27 billion, surpassing the high of \$26.1 billion recorded in entire 2017, according to an EY report.

**Equity Markets:** Key domestic indices slumped yesterday following extreme weakness in global stocks. Indices settled lower for third day in a row as investors turned cautious in the run-up to the announcement of five state elections' results next week. The outcomes of the five state elections will likely set the tone for the general elections next year. Voting in Rajasthan and Telangana will take place today and the counting of votes in all the states will be done on 11 December 2018. Assembly elections in Madhya Pradesh and Mizoram were held on 28 November 2018. The election in Chhattisgarh Assembly was held in two phases 12 and 20 November 2018.

**Corporate News:** HCL Technologies (HCL) said it will acquire select IBM software products for \$1.8 billion. The transaction is expected to close by mid-2019, subject to completion of applicable regulatory reviews. Wipro's digital business arm, Wipro Digital, and Alfresco, a leading enterprise open source provider of process automation, content management and information governance software, announced an expanded global partnership to create, build and run open source based digital transformation programs for its clients, across the globe. Coal India announced that the President of India, acting through the Ministry of Coal, Government of India, has sold 13.73 crore equity shares, or 2.21% equity, of Coal India to Reliance Nippon Life Asset Management.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(51.2)	(8.1)	(42.6)
MF(INR cr)	(7.8)	(335.4)	463.3

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,978	33,180	35,011
F&O(INR cr)	1,878,740	880,444	968,607

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.7	19.3	15.5
NSE VIX	19.3	18.5	14.9

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,198	(1.2) %	7.7 %	Energy	13,990	(2.1) %	5.3 %
IT	14,694	(2.1) %	15.6 %	Pharma	8,687	(1.4) %	0.8 %
Metals	3,085	(1.1) %	(12.8) %	Finance	11,159	(1.4) %	8.7 %
Auto	8,791	(2.2) %	(20.5) %	PSU	2,826	(1.9) %	(1.0) %
FMCG	29,489	(1.5) %	11.3 %	Real Estate	229	(2.4) %	(22.6) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun TV Net	591	2.9 %	(31.3) %	Indiabulls	733	(5.5) %	(41.0) %
Siemens	923	1.9 %	(16.2) %	Aurobindo	752	(5.5) %	27.0 %
Sun Pharma	420	1.7 %	(17.3) %	DLF	167	(5.4) %	(16.7) %
ICICI Lomb	902	1.3 %	15.1 %	Maruti Suz	7,210	(4.6) %	(20.0) %
NHPC Ltd	26	1.1 %	(5.5) %	Tech Mahin	696	(4.2) %	8.8 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Foreign Reserves (Australian dollar) (NOV)	07-12-2018	05:30	AUD	-	-
Full Time Employment Change (NOV)	07-12-2018	13:30	CAD	-	33.9
Hourly Wage Rate Permanent Employees (YoY) (NOV)	07-12-2018	13:30	CAD	-	0.019
Net Change in Employment (NOV)	07-12-2018	13:30	CAD	-	-
Part Time Employment Change (NOV)	07-12-2018	13:30	CAD	-	(22.6)
Participation Rate (NOV)	07-12-2018	13:30	CAD	-	65.2
Unemployment Rate (NOV)	07-12-2018	13:30	CAD	-	0.058
Foreign Currency Reserves (NOV)	07-12-2018	08:00	CHF	-	-
German Industrial Production n.s.a. and w.d.a. (YoY) (OCT)	07-12-2018	07:00	EUR	-	0.008
German Industrial Production s.a. (MoM) (OCT)	07-12-2018	07:00	EUR	-	0.002
Labor Costs SA (QoQ) (3Q)	07-12-2018	07:00	EUR	-	0.002
Labor Costs WDA (YoY) (3Q)	07-12-2018	07:00	EUR	-	0.02
Euro-Zone Government Expenditure (QoQ) (3Q)	07-12-2018	10:00	EUR	-	0.004
Euro-Zone Gross Domestic Product s.a. (QoQ) (3Q F)	07-12-2018	10:00	EUR	-	0.002
Euro-Zone Gross Domestic Product s.a. (YoY) (3Q F)	07-12-2018	10:00	EUR	-	0.017
Euro-Zone Gross Fixed Capital (QoQ) (3Q)	07-12-2018	10:00	EUR	-	0.012
Euro-Zone Household Consumption (QoQ) (3Q)	07-12-2018	10:00	EUR	-	0.002
Halifax House Price 3Mths/Year (NOV)	07-12-2018	08:30	GBP	-	0.015
Halifax House Prices (MoM) (NOV)	07-12-2018	08:30	GBP	-	0.007
BoE/TNS Inflation Next 12 Mths (NOV)	07-12-2018	09:30	GBP	-	0.03
Labor Cash Earnings (YoY) (OCT)	07-12-2018	00:00	JPY	-	0.011
Real Cash Earnings (YoY) (OCT)	07-12-2018	00:00	JPY	-	(0.004)
Coincident Index (OCT P)	07-12-2018	05:00	JPY	-	114.4
Leading Index CI (OCT P)	07-12-2018	05:00	JPY	-	104.3
Bi-Weekly Core CPI (NOV 30)	07-12-2018	14:00	MXN	-	0.0019
Bi-Weekly CPI (NOV 30)	07-12-2018	14:00	MXN	-	0.0061
Bi-Weekly CPI (YoY) (NOV 30)	07-12-2018	14:00	MXN	-	0.0456
CPI (MoM) (NOV)	07-12-2018	14:00	MXN	-	0.0052
CPI (YoY) (NOV)	07-12-2018	14:00	MXN	-	0.040



CPI Core (MoM) (NOV)	07-12-2018	14:00	MXN	-	0.0031
Average Hourly Earnings (MoM) (NOV)	07-12-2018	13:30	USD	-	0.002
Average Hourly Earnings (YoY) (NOV)	07-12-2018	13:30	USD	-	0.031
Average Weekly Hours All Employees (NOV)	07-12-2018	13:30	USD	-	34.5
Change in Manufact. Payrolls (NOV)	07-12-2018	13:30	USD	-	-
Change in Non-farm Payrolls (NOV)	07-12-2018	13:30	USD	-	-
Change in Private Payrolls (NOV)	07-12-2018	13:30	USD	-	-
Labor Force Participation Rate (NOV)	07-12-2018	13:30	USD	-	0.629
Two-Month Payroll Net Revision (NOV)	07-12-2018	13:30	USD	-	-
Underemployment Rate (NOV)	07-12-2018	13:30	USD	-	0.074
Unemployment Rate (NOV)	07-12-2018	13:30	USD	-	0.037
U. of Mich. 1 Yr Inflation (DEC P)	07-12-2018	15:00	USD	-	0.028
U. of Mich. 5-10 Yr Inflation (DEC P)	07-12-2018	15:00	USD	-	0.026
U. of Mich. Current Conditions (DEC P)	07-12-2018	15:00	USD	-	112.3
U. of Mich. Expectations (DEC P)	07-12-2018	15:00	USD	-	88.1
U. of Mich. Sentiment (DEC P)	07-12-2018	15:00	USD	-	97.5
Wholesale Inventories (MoM) (OCT F)	07-12-2018	15:00	USD	-	0.007
Wholesale Trade Sales (MoM) (OCT)	07-12-2018	15:00	USD	-	0.002
Brainard Speaks at Peterson Institute in Washington	07-12-2018	17:00	USD	-	-
Baker Hughes U.S. Rig Count (DEC 7)	07-12-2018	18:00	USD	-	1076
Consumer Credit (OCT)	07-12-2018	20:00	USD	-	-

..... End of Report .....

