



08 Nov.2019

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D    | % YTD    |
|----------------|--------|---------|----------|
| CNX NIFTY      | 11,987 | (0.2) % | 2.7 %    |
| BSE SENSEX     | 40,654 | 0.5 %   | 4.3 %    |
| CNX BANK       | 30,571 | (0.2) % | 0.8 %    |
| CNX MIDCAP     | 16,823 | 0.2 %   | (8.2) %  |
| CNX SMALLCAP   | 5,761  | (0.0) % | (14.5) % |

| GLOBAL INDICES     | LATEST | % 1D  | % YTD  |
|--------------------|--------|-------|--------|
| DOW JONES          | 27,675 | 0.7 % | 18.6 % |
| S&P 500            | 3,085  | 0.3 % | 23.1 % |
| FTSE 100           | 7,406  | 0.1 % | 10.0 % |
| HANG SENG          | 27,847 | 0.6 % | 10.8 % |
| NIKKEI             | 23,330 | 0.1 % | 19.3 % |
| SHANGHAI COMPOSITE | 2,979  | 0.0 % | 20.8 % |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 70.68  | 0.3 %   | 1.8 %   |
| EUR/USD | 1.11   | (0.2) % | (3.3) % |
| GBP/USD | 1.29   | (0.1) % | 1.0 %   |
| USD/JPY | 109.00 | 0.1 %   | (0.6) % |
| USD/AUD | 1.45   | 0.1 %   | 2.1 %   |
| USD/SGD | 1.36   | 0.1 %   | (0.4) % |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 57     | 1.8 %   | 23.0 %  |
| Gold(INR/10g)      | 38,180 | (0.3) % | 21.1 %  |
| Gold Comex(USD/oz) | 1,492  | 0.3 %   | 15.6 %  |
| SILVER(INR/1Kg)    | 45,358 | (0.4) % | 18.5 %  |
| Aluminium(USD/MT)  | 1,817  | 0.2 %   | (2.2) % |
| Copper(USD/MT)     | 5,914  | 0.6 %   | 1.3 %   |

**FIXED INCOME**

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

**Global Economy:** The Fed said consumer credit rose by \$9.5 billion in September after jumping by \$17.9 billion in August. Economists had expected consumer credit to climb by \$15.0 billion. China's Commerce Ministry stated that the US and China have agreed to cancel existing tariffs in different phases. If China and the US reach phase one trade deal, both sides must cancel existing tariffs at the same time, in the same proportion based on agreement. China's foreign exchange reserves increased in October, data from the People's Bank of China showed Thursday. Forex increased by \$12.7 billion from the previous month to \$3.105 trillion. Germany's industrial production dropped 0.6% month-on-month in September, reversing a 0.4% rise in August, data from Destatis revealed Thursday. On a yearly basis, industrial output was down 4.3%, which was faster than the 3.9% decrease logged in August. Excluding energy and construction, industrial production fell 1.3% from previous month. Energy output advanced 2% and construction expanded 1.8% in September. UK house prices slipped 0.1% in October from the previous month, when prices were down 0.4%, data from the Lloyds Bank subsidiary Halifax and IHS Markit showed on Thursday. In three months to October, house price inflation halved to 0.2% from 0.4% in three months to September. On a yearly basis, house prices gained 0.9%. Australia recorded a seasonally adjusted merchandise trade surplus of A\$7.180 billion in September, the Australian Bureau of Statistics said on Thursday - up 9% on month. Exports were up A\$1.452 billion or 3% on month to A\$43.215 billion. Imports also gained A\$889 million or 3% on month to A\$36.034 billion.

**Global Equities:** US stocks hit fresh high after China and the United States reportedly agreed to cancel tariffs on each other's goods for both sides to reach a phase one trade deal.

**Indian Economy:** Union Cabinet chaired by Prime Minister Narendra Modi approved the establishment of a 'Special Window' fund to provide priority debt financing for the completion of stalled housing projects that are in the Affordable and Middle-Income Housing sector. For the purposes of the fund, the government shall act as the Sponsor and the total commitment to be infused by the Government would be upto Rs 10,000 crore.

**Equity Markets:** Benchmark indices extended gains for second straight session on Thursday, reacting to development on the US-China trade front. Media reports suggested that China and the US have agreed to roll back tariffs on each other's goods in phases as they work toward a deal between the two sides. BSE Sensex rose 183.96 points or 0.45% to close at a 40,653.74, its record closing high level. The Sensex scaled fresh all time high of 40,688.27 at the fag end of the trading session. The Nifty 50 index rose 50.05 points or 0.42% to 12,016.10. The index hit an intraday high of 12,021.40. The Nifty closed above the crucial 12,000-mark for the first time since 4 June 2019.

**Corporate News:** Power Grid Corporation of India reported 9.49% rise in consolidated net profit to Rs 2571.10 crore on 2.34% fall in total income to Rs 9659.79 crore in Q2 September 2019 over Q2 September 2018. Bharat Petroleum Corporation (BPCL) reported 2.68% rise in consolidated net profit to Rs 1502.63 crore on 10.99% fall in total income to Rs 65015.28 crore in Q2 September 2019 over Q2 September 2018. GlaxoSmithkline Consumer Healthcare reported 25.34% rise in net profit to Rs 345.31 crore on 4.57% rise in total income to Rs 1423.22 crore in Q2 September 2019 over Q2 September 2018. Eicher Motors, GAIL (India), Mahindra & Mahindra and Tata Power Company will announce their quarterly results today, 8 November 2019. Reliance Strategic Business Ventures (RSBVL), a wholly owned subsidiary of the Reliance Industries has acquired further shares in SkyTran Inc. on 6 November 2019, to increase its shareholding in SkyTran Inc. to 17.37% on a fully diluted basis. Infosys announced the opening of its new state-of-the-art Digital Innovation Centre in Dusseldorf, Germany.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 178.0         | 125.2      | 26.5       |
| MF(INR cr)  | (1,424.9)     | (445.6)    | 361.8      |

### MARKET TURNOVER

|              | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 43,074        | 43,310         | 36,064         |
| F&O(INR cr)  | 2,863,648     | 1,356,108      | 1,347,461      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 19.8          | 18.7           | 15.9           |
| NSE VIX  | 15.2          | 15.7           | 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  | 30,633        | 0.1 %       | 1.0 %        | Energy      | 16,195        | (0.1) %     | (2.0) %      |
| IT     | 15,624        | 0.4 %       | (1.4) %      | Pharma      | 7,966         | 0.5 %       | (15.0) %     |
| Metals | 2,659         | 1.0 %       | (14.3) %     | Finance     | 13,895        | 0.5 %       | 11.2 %       |
| Auto   | 8,240         | (0.2) %     | (2.1) %      | PSU         | 2,484         | (1.4) %     | (26.6) %     |
| FMCG   | 32,536        | 0.4 %       | 7.8 %        | Real Estate | 276           | 0.9 %       | 3.5 %        |

### 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Indiabulls         | 238           | 8.6 %       | (71.9) %     | NMDC              | 108           | (5.2) %     | 2.0 %        |
| Bharti Inf         | 229           | 3.8 %       | (27.0) %     | UPL               | 578           | (4.8) %     | (7.3) %      |
| Piramal En         | 1,800         | 3.7 %       | (33.2) %     | Lupin             | 737           | (4.4) %     | (3.8) %      |
| Colgate-Pa         | 1,601         | 3.5 %       | 27.3 %       | New India         | 152           | (3.8) %     | (19.5) %     |
| L&T Fin.Ho         | 99            | 3.3 %       | (34.9) %     | Punjab Nat        | 62            | (3.6) %     | (36.5) %     |

### EVENTS CALENDAR

| <i>EVENT</i>         | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| <b>No Data Found</b> |             |                  |               |               |                       |

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