



09 Dec.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,922	0.0 %	2.2 %
BSE SENSEX	40,445	(0.8) %	4.0 %
CNX BANK	31,342	0.0 %	3.3 %
CNX MIDCAP	16,732	0.0 %	(8.7) %
CNX SMALLCAP	5,697	0.0 %	(15.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,015	1.2 %	20.1 %
S&P 500	3,146	0.9 %	25.5 %
FTSE 100	7,240	1.4 %	7.5 %
HANG SENG	26,498	1.1 %	5.4 %
NIKKEI	23,354	0.2 %	19.4 %
SHANGHAI COMPOSITE	2,912	0.4 %	18.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.11	(0.1) %	2.4 %
EUR/USD	1.11	(0.1) %	(3.2) %
GBP/USD	1.31	0.0 %	3.1 %
USD/JPY	108.66	(0.2) %	(0.9) %
USD/AUD	1.46	(0.1) %	2.9 %
USD/SGD	1.36	(0.1) %	(0.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.2 %	25.5 %
Gold(INR/10g)	38,032	(0.0) %	20.6 %
Gold Comex(USD/oz)	1,458	(1.1) %	13.0 %
SILVER(INR/1Kg)	44,062	0.4 %	15.2 %
Aluminium(USD/MT)	1,751	(0.3) %	(5.8) %
Copper(USD/MT)	5,868	0.2 %	0.5 %

FIXED INCOME

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

Global Economy: The US non-farm payroll employment surged up by 266,000 jobs in November after rising by an upwardly revised 156,000 jobs in October. With the stronger than expected job growth, the unemployment rate edged down to 3.5% in November from 3.6% in October. University of Michigan said its consumer sentiment index climbed to 99.2 in December from the final November reading of 96.8. Germany's industrial production declined at the fastest pace in six months in October, led by a sharp decrease in capital goods output in October, data from Destatis revealed on Friday. Industrial production tanked 1.7 percent on a monthly basis in October, much bigger than the 0.6% fall logged in September. Japan's leading index fell to the lowest level in nearly ten years in October, data from the Cabinet Office showed on Friday. The leading index, which measures the future economic activity, came in at 91.8 in October, down from 91.9 in September.

Global Equities: The US stocks edged up on supportive economic cues. DOW jumped 1.2% on the day.

Indian Economy: According to data released by the Agriculture Ministry as against 413 lakh hectares (lh) sown in the same week in the previous year, farmers across the country covered 418 lh as on 6th December 2019, recording a small rise of 1.24% year-on-year. Area under Wheat surged 4.29% to 202.54 lh while the total acreage under coarse cereals stood at 35.56 lh, up 8.58%. Pulses acreage is down 6% at 105.16 lh while oilseeds area is also lower by 1.58% at 65.05 lh.

Equity Markets: Key market barometers tumbled amid wide spread selling pressure on Friday. After starting the session in the green, the market reversed trend as trading progressed and hit day's low in mid-afternoon trade. Banks and auto shares witnessed major selling pressure. Shares of state-run banks collapsed. The barometer index, the BSE Sensex, fell 334.44 points or 0.82% to 40,445.15. The Nifty 50 index fell 96.90 points or 0.81% to 11,921.50. In the broader market, the S&P BSE Mid-Cap index slipped 1.26% while the S&P BSE Small-Cap index fell 0.86%.

Corporate News: Maruti Suzuki will be in focus after it released the production figures of the company for the month of November, 2019. Overall production rose from 135946 units to 141834 units yoy. Total Passenger Vehicles increased from 134149 units to 139084 units yoy in the month of November 2019. ITC said that the company has acquired, in the first tranche, 100 equity shares of Rs 10 each and 1,864 Compulsorily Convertible Preference Shares of Rs 10 each of Delectable Technologies Private Limited, representing 11.15% of its share capital on a fully diluted basis. Bank of India said the board of directors has considered and approved the issuance of upto 125 crore fresh equity shares through QIP, public issue, rights issue, private placement, or such other mode of issue as permitted at an appropriate time. The bank said its board has also approved issuance of such securities (including Tier I, Tier II bonds, preference shares) which may be classified for Tier I and/or Tier II capital on a private placement / public issue basis, in one or more tranches upto an amount of Rs 10,000 crore at an appropriate time.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	61.1	(32.0)	38.4
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)	35,090	38,622	36,970
F&O(INR cr)	1,003,597	1,541,247	1,354,092

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	16.1
NSE VIX	13.6	14.0	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	31,342	(1.2) %	3.3 %	Energy	15,812	(0.7) %	(4.4) %
IT	15,290	(0.5) %	(3.5) %	Pharma	7,958	(1.2) %	(15.1) %
Metals	2,536	(0.3) %	(18.3) %	Finance	14,042	(1.1) %	12.3 %
Auto	7,807	(1.7) %	(7.2) %	PSU	2,461	(4.4) %	(27.3) %
FMCG	30,536	(0.8) %	1.1 %	Real Estate	283	(0.9) %	6.1 %

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>
Bharti Inf	260	5.5 %	(17.4) %	Yes Bank	56	(9.8) %	(79.7) %
Colgate-Pa	1,481	2.1 %	17.7 %	Vodafone I	7	(5.5) %	(61.1) %
Kotak Mah.	1,674	1.5 %	25.0 %	Bank of Ba	97	(5.1) %	(26.9) %
Berger Pai	501	1.4 %	51.7 %	St Bk of I	320	(4.8) %	(0.9) %
P & G Hygi	11,486	1.2 %	6.4 %	Indiabulls	272	(4.4) %	(67.8) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Housing Starts (NOV)	09-12-2019	18:45	CAD	-	-
Building Permits (MoM) (OCT)	09-12-2019	19:00	CAD	-	(0.065)
Unemployment Rate (NOV)	09-12-2019	12:15	CHF	-	0.022
Domestic Sight Deposits CHF (DEC 6)	09-12-2019	14:30	CHF	-	-
German Trade Balance (OCT)	09-12-2019	12:30	EUR	-	-
Euro-Zone Sentix Investor Confidence (DEC)	09-12-2019	15:00	EUR	-	(4.5)
Bankruptcies (YoY) (NOV)	09-12-2019	10:00	JPY	-	-
Bank Lending Ex-Trusts (YoY) (NOV)	09-12-2019	5:20	JPY	-	0.022
CPI (YoY) (NOV)	09-12-2019	17:30	MXN	-	0.0302
Manufacturing Activity (3Q)	09-12-2019	3:15	NZD	-	(0.007)
U.S. to Sell 13-Week Bills	09-12-2019	22:00	USD	-	-
U.S. to Sell 3-Year Notes	09-12-2019	23:30	USD	-	-

..... End of Report