



13 Nov.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,452	(0.3) %	2.4 %
BSE SENSEX	34,813	(1.0) %	4.3 %
CNX BANK	25,422	(0.5) %	4.5 %
CNX MIDCAP	17,382	(0.3) %	(9.0) %
CNX SMALLCAP	6,237	(0.3) %	(21.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,387	(2.3) %	2.3 %
S&P 500	2,726	(2.0) %	1.1 %
FTSE 100	7,053	(0.7) %	(7.8) %
HANG SENG	25,633	0.1 %	(16.0) %
NIKKEI	22,270	0.1 %	(5.3) %
SHANGHAI COMPOSITE	2,631	1.2 %	(21.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.89	(0.2) %	14.5 %
EUR/USD	1.12	(1.7) %	(6.5) %
GBP/USD	1.29	(1.8) %	(4.8) %
USD/JPY	113.73	0.3 %	0.9 %
USD/AUD	1.39	0.7 %	8.9 %
USD/SGD	1.38	0.7 %	3.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	(0.8) %	(0.3) %
Gold(INR/10g)	31,200	(1.8) %	6.3 %
Gold Comex(USD/oz)	1,210	(0.9) %	(7.5) %
SILVER(INR/1Kg)	36,947	(3.3) %	(4.3) %
Aluminium(USD/MT)	1,965	(0.6) %	(12.9) %
Copper(USD/MT)	6,088	(0.8) %	(15.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	(0.0) %	0.7 %

Global Economy: The US dollar stayed firm, extending its recent gains as global sentiment remained tense. The dollar index soared to an eighteen month high following recent strength. The French economy likely retained its growth momentum in the fourth quarter, latest projection from the Bank of France indicated on Monday. Gross domestic product is set to grow 0.4% in the fourth quarter of this year. The economic growth accelerated to 0.4% in the third quarter from 0.2% in the second quarter. WTI Crude oil futures jumped on bargain buying to start the new week in a positive manner as Saudi Arabia announced a supply cut in December, according to media reports. Oil has been on a falling spree over the recent weeks and tested near eight month low before the today's turnaround.

Global Equities: Weak earnings weighed on European markets amid a sluggish economy. Lack of major economic data points also kept the sentiments under check.

Indian Economy: The Quick Estimates of Index of Industrial Production (IIP) with base 2011-12 for the month of September 2018 stands at 128.6, which is 4.5% higher as compared to the level in the month of September 2017, according to a latest release from Ministry of Statistics & Programme Implementation. The reading was 4.3% in August. The cumulative growth for the period April-September 2018 over the corresponding period of the previous year stands at 5.1%. The Consumer Price Index (CPI) for October came in at 3.31% compared to 3.77% in September. Rural CPI is 2.82 while urban CPI is 3.97. The reading was the lowest since September 2017. Domestic bank credit growth clocked an impressive 14.41% during the fortnight to October 26, the Reserve Bank has said. This was the highest level for domestic bank credit in last five years. Provisional figures released by the central bank showed the overall bank credit increased to Rs 93.01 trillion as of October 26 from Rs 81.29 trillion in the year ago period. Despite higher oil prices and periodic slowdowns, the Indian Economy has clocked good growth rate. NPAs of banks needs to be curbed as healthy banks are necessary for growth of economy, stated the finance minister Arun Jaitely.

Equity Markets: Late selling hurt local markets. Local stocks witnessed sharp losses on broad-based selling pressure in index pivots. The Sensex settled below the psychological 35,000 level after sliding below that level in afternoon trade. Stocks started on a positive note but succumbed to selling pressure as the session progressed.

Corporate News: Britannia reported a net profit of Rs 303 crore for the September quarter. This is a jump of 16% yoy. The company reported revenue of Rs 2,869.59 crore, up 13% while the EBITDA edged up 20% to Rs 454.4 crore. Himadri Speciality Chemical approved a proposal for raising of fund by further issue of securities by way of Preferential Issue/QIP / FCCBs / FCEBs / ADRs / GDRs and/or other eligible securities convertible into equity shares for an aggregate amount not exceeding Rs 1,000 crore. Lupin announced the launch of Atovaquone Oral Suspension USP, 750 mg/5 mL having received an approval from the United States Food and Drug Administration (FDA) earlier. Jet Airways reported a loss of Rs 1,297.46 crore for the quarter ended September 30 against a profit of Rs 49.63 crore in the corresponding quarter last year. Revenue increased to Rs 6,161.15 crore during the quarter against Rs 5,626.61 crore. Total expenditure increased to Rs 7,534 crore in Q2FY19 over Rs 5,708.55 crore. Bank of India reported a net loss of Rs 1,156.25 crore for the September quarter as compared to a net profit of Rs 179.07 crore during Q2 of FY18. The net interest income saw marginal 0.6% growth year on year to Rs 2,927 crore while the net NPA ratio fell to 7.64%, down from 8.45% during the June quarter.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(37.2)	20.7	(52.6)
MF(INR cr)	(143.7)	58.0	493.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,841	26,858	35,078
F&O(INR cr)	571,569	938,478	970,219

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.4	18.2	15.0
NSE VIX	19.4	18.6	14.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,540	(0.9) %	5.0 %	Energy	13,849	(1.6) %	4.2 %
IT	14,651	0.7 %	15.3 %	Pharma	9,558	(0.9) %	10.9 %
Metals	3,385	(1.4) %	(4.4) %	Finance	10,757	(1.1) %	4.8 %
Auto	9,052	(2.4) %	(18.1) %	PSU	2,868	(2.1) %	0.5 %
FMCG	28,536	(0.7) %	7.7 %	Real Estate	223	(1.5) %	(24.8) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Titan Comp	895	5.6 %	(5.2) %	H P C L	225	(6.7) %	(34.7) %
Tech Mahin	725	2.5 %	13.2 %	Tata Motor	186	(4.7) %	(45.1) %
Tata Steel	583	1.9 %	0.7 %	I O C L	135	(4.7) %	(20.8) %
New India	230	1.8 %	(34.6) %	Interglobe	949	(4.4) %	(28.6) %
Kotak Mah.	1,154	1.6 %	5.2 %	Bajaj Fin.	2,278	(4.1) %	25.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Conditions (OCT)	13-11-2018	0:30	AUD	-	15
NAB Business Confidence (OCT)	13-11-2018	0:30	AUD	-	6
Westpac Consumer Conf Index (NOV)	13-11-2018	23:30	AUD	-	101.5
Westpac Consumer Confidence (NOV)	13-11-2018	23:30	AUD	-	0.01
Producer & Import Prices (MoM) (OCT)	13-11-2018	8:15	CHF	-	(0.002)
Producer & Import Prices (YoY) (OCT)	13-11-2018	8:15	CHF	-	0.026
Euro-Zone ZEW Survey (Economic Sentiment) (NOV)	13-11-2018	10:00	EUR	-	(19.4)
German ZEW Survey Current Situation (NOV)	13-11-2018	10:00	EUR	-	70.1
German ZEW Survey Expectations (NOV)	13-11-2018	10:00	EUR	-	(24.7)
ECB Vice President de Guindos Speaks in Frankfurt	13-11-2018	19:00	EUR	-	-
German Consumer Price Index (MoM) (OCT F)	13-11-2018	7:00	EUR	-	0.002
German Consumer Price Index (YoY) (OCT F)	13-11-2018	7:00	EUR	-	0.025
ECB's Praet Speaks in London	13-11-2018	8:00	EUR	-	-
ECB's Lautenschlaeger Speaks in Frankfurt	13-11-2018	8:45	EUR	-	-
Average Weekly Earnings (3M/YoY) (SEP)	13-11-2018	9:30	GBP	-	0.027
Claimant Count Rate (OCT)	13-11-2018	9:30	GBP	-	0.026
Employment Change 3M/3M (SEP)	13-11-2018	9:30	GBP	-	-
ILO Unemployment Rate 3Mths (SEP)	13-11-2018	9:30	GBP	-	0.04
Jobless Claims Change (OCT)	13-11-2018	9:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (SEP)	13-11-2018	9:30	GBP	-	0.031
Gross Domestic Product Annualized s.a. (QoQ) (3Q P)	13-11-2018	23:50	JPY	-	0.03
Gross Domestic Product Business Spending (QoQ) (3Q P)	13-11-2018	23:50	JPY	-	0.031
Gross Domestic Product Deflator (YoY) (3Q P)	13-11-2018	23:50	JPY	-	0.001
Gross Domestic Product Private Consumption (QoQ) (3Q P)	13-11-2018	23:50	JPY	-	0.007
Gross Domestic Product s.a. (QoQ) (3Q P)	13-11-2018	23:50	JPY	-	0.007
Nominal Gross Domestic Product (QoQ) (3Q P)	13-11-2018	23:50	JPY	-	0.007
NFIB Small Business Optimism (OCT)	13-11-2018	11:00	USD	-	107.9
Fed's Brainard Speaks on AI and the New Financial Landscape	13-11-2018	15:00	USD	-	-
Fed's Kashyap Speaks at Conference on Innovation	13-11-2018	15:00	USD	-	-



U.S. to Sell USD39 Bln 6-Month Bills	13-11-2018	16:30	USD	-	-
U.S. to Sell USD45 Bln 3-Month Bills	13-11-2018	16:30	USD	-	-
U.S. to Sell USD30 Bln 8-Week Bills	13-11-2018	18:00	USD	-	-
U.S. to Sell USD50 Bln 4-Week Bills	13-11-2018	18:00	USD	-	-
Monthly Budget Statement (OCT)	13-11-2018	19:00	USD	-	-
Fed's Harker Speaks at Fintech Conference	13-11-2018	19:20	USD	-	-

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