



14 Nov.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| CNX NIFTY | 10,635 | 0.5 % | 4.1 % |
| BSE SENSEX | 35,144 | 1.0 % | 6.1 % |
| CNX BANK | 25,952 | 0.7 % | 6.7 % |
| CNX MIDCAP | 17,608 | 0.7 % | (7.8) % |
| CNX SMALLCAP | 6,310 | 0.6 % | (20.4) % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 25,286 | (0.4) % | 1.9 % |
| S&P 500 | 2,722 | (0.2) % | 1.0 % |
| FTSE 100 | 7,054 | 0.0 % | (7.8) % |
| HANG SENG | 25,793 | 0.6 % | (15.5) % |
| NIKKEI | 21,811 | (2.1) % | (7.2) % |
| SHANGHAI COMPOSITE | 2,655 | 0.9 % | (20.7) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 72.67 | 0.2 % | 14.1 % |
| EUR/USD | 1.13 | (0.3) % | (5.9) % |
| GBP/USD | 1.30 | 0.3 % | (3.7) % |
| USD/JPY | 113.89 | 0.1 % | 1.0 % |
| USD/AUD | 1.38 | 0.0 % | 8.2 % |
| USD/SGD | 1.38 | 0.1 % | 3.4 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 60 | (0.4) % | (0.7) % |
| Gold(INR/10g) | 30,898 | (1.0) % | 5.2 % |
| Gold Comex(USD/oz) | 1,205 | (0.4) % | (8.0) % |
| SILVER(INR/1Kg) | 36,462 | (1.3) % | (5.5) % |
| Aluminium(USD/MT) | 1,934 | (1.6) % | (14.3) % |
| Copper(USD/MT) | 6,084 | (0.1) % | (15.3) % |

FIXED INCOME

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

Global Economy: German investor confidence improved in November, defying expectations for further weakness, survey data from the ZEW showed on Tuesday. The ZEW Indicator of Economic Sentiment for Germany rose to -24.1 from -24.7 in October, the think tank said. Germany's consumer price index rose 2.5% year-on-year in October following a 2.3% increase in September, final figures from the Federal Statistical Office showed. A higher inflation rate was last recorded in September 2008, the statistical office said. Energy price growth continued to drive headline inflation. UK unemployment rate rose slightly in the three months to September to 4.1%, preliminary data from the Office for National Statistics showed. In the past two months, the ILO jobless rate was steady at 4%, which was the lowest level since early 1975. The IMF noted in a latest update that tightening global financial conditions have increased the urgency of reducing budget deficits and debt in countries of the Middle East and Central Asia. The buildup of debt in recent years – which now exceeds 50% of GDP in almost half of the countries in the region – requires urgent action.

Global Equities: Stocks recovered amid easing trade tensions. Bargain buying stayed in place after recent losses.

Indian Economy: The Union Minister of Petroleum and Natural Gas & Skill Development and Entrepreneurship Dharmendra Pradhan has invited the private investors to participate and make the most of the India growth story. Pradhan said that India is presently the 3rd largest energy consumer in the world. Energy consumption in India in the past decade has increased at a compound annual growth rate of more than 5%. Petrol, diesel prices were cut for the fifth straight day on Monday amid a correction in international crude oil prices. In Delhi, unbranded petrol was priced at Rs 77.56 per litre as against Rs 77.73 and diesel was at 72.31 compared to Rs 72.46, according to Indian Oil Corporation.

Equity Markets: Local stocks jumped. Key benchmark indices scored strong gains amid broad-based buying demand in index pivots especially Reliance Industries, ICICI Bank and HDFC. The Sensex ended above 35,000 mark after regaining that level in mid-afternoon trade. Oil & gas stocks gained. Most private sector banks rose. Most public sector bank stocks declined though.

Corporate News: Tata Consultancy Services has been recognized as a Leader in the Everest Group PEAK Matrix™ for Open Banking IT Services. The report highlights TCS' investments in a wide range of open banking solutions, global CoEs, and delivery presence, as major strengths and contributors to its wins in the market. Pharma major Sun Pharmaceutical posted a consolidated loss of Rs 218.82 crore for quarter ended September 30, on one-time loss of Rs 1,214.38 crore with respect to Modafinil antitrust litigation. The drug firm had posted a profit of Rs 912.12 crore in the corresponding quarter last year. Consolidated total revenue increased 4.32% year-on-year to Rs 6,937.63 crore. Hindalco, the country's largest aluminium producer, will invest at least Rs 6,000 crore towards setting up of downstream facilities in India over the next four years, according to media reports.



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|---------|--------|--------|
| FII(USD mm) | 328.2 | 6.6 | (52.2) |
| MF(INR cr) | (873.1) | (84.2) | 484.2 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 29,858 | 27,233 | 35,044 |
| F&O(INR cr) | 736,362 | 909,604 | 968,690 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 20.5 | 18.5 | 15.1 |
| NSE VIX | 18.7 | 18.6 | 14.5 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|-------|----------|-------------|--------|---------|----------|
| Banks | 25,769 | 0.9 % | 5.9 % | Energy | 14,091 | 1.7 % | 6.0 % |
| IT | 14,698 | 0.3 % | 15.7 % | Pharma | 9,423 | (1.4) % | 9.3 % |
| Metals | 3,411 | 0.8 % | (3.6) % | Finance | 10,868 | 1.0 % | 5.9 % |
| Auto | 9,127 | 0.8 % | (17.5) % | PSU | 2,865 | (0.1) % | 0.4 % |
| FMCG | 28,783 | 0.9 % | 8.6 % | Real Estate | 221 | (0.6) % | (25.3) % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|-------|----------|------------|--------|---------|----------|
| Eicher Mot | 23,242 | 6.0 % | (17.8) % | Sun Pharma | 562 | (4.7) % | 10.6 % |
| I O C L | 141 | 4.7 % | (17.0) % | Tata Motor | 180 | (3.5) % | (47.1) % |
| B P C L | 303 | 4.1 % | (28.4) % | New India | 223 | (3.1) % | (36.6) % |
| Container | 670 | 3.9 % | 8.0 % | Tata Motor | 98 | (2.9) % | (48.2) % |
| Pidilite I | 1,063 | 3.5 % | 12.9 % | Indiabulls | 842 | (2.7) % | (32.3) % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--|------------|-----------|--------|--------|----------------|
| Wage Price Index (QoQ) (3Q) | 14-11-2018 | 0:30 | AUD | - | 0.006 |
| Wage Price Index (YoY) (3Q) | 14-11-2018 | 0:30 | AUD | - | 0.021 |
| Fixed Assets Ex Rural YTD (YoY) (OCT) | 14-11-2018 | 2:00 | CNY | - | 0.054 |
| Industrial Production (YoY) (OCT) | 14-11-2018 | 2:00 | CNY | - | 0.058 |
| Industrial Production YTD (YoY) (OCT) | 14-11-2018 | 2:00 | CNY | - | 0.064 |
| Property Investment (YoY) (OCT) | 14-11-2018 | 2:00 | CNY | - | 0.099 |
| Retail Sales (YoY) (OCT) | 14-11-2018 | 2:00 | CNY | - | 0.092 |
| Retail Sales YTD (YoY) (OCT) | 14-11-2018 | 2:00 | CNY | - | 0.093 |
| Surveyed Jobless Rate (OCT) | 14-11-2018 | 2:00 | CNY | - | 0.049 |
| Euro-Zone Employment (QoQ) (3Q P) | 14-11-2018 | 10:00 | EUR | - | 0.004 |
| Euro-Zone Employment (YoY) (3Q P) | 14-11-2018 | 10:00 | EUR | - | 0.015 |
| Euro-Zone Gross Domestic Product s.a. (QoQ) (3Q P) | 14-11-2018 | 10:00 | EUR | - | 0.002 |
| Euro-Zone Gross Domestic Product s.a. (YoY) (3Q P) | 14-11-2018 | 10:00 | EUR | - | 0.017 |
| Euro-Zone Industrial Production s.a. (MoM) (SEP) | 14-11-2018 | 10:00 | EUR | - | 0.01 |
| Euro-Zone Industrial Production w.d.a. (YoY) (SEP) | 14-11-2018 | 10:00 | EUR | - | 0.009 |
| German Gross Domestic Product n.s.a. (YoY) (3Q P) | 14-11-2018 | 7:00 | EUR | - | 0.023 |
| German Gross Domestic Product s.a. (QoQ) (3Q P) | 14-11-2018 | 7:00 | EUR | - | 0.005 |
| German Gross Domestic Product w.d.a. (YoY) (3Q P) | 14-11-2018 | 7:00 | EUR | - | 0.02 |
| Consumer Price Index (MoM) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.001 |
| Consumer Price Index (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.024 |
| Consumer Price Index Including Housing Costs (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.022 |
| Core Consumer Price Index (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.019 |
| House Price Index (YoY) (SEP) | 14-11-2018 | 9:30 | GBP | - | 0.032 |
| Producer Price Index Input n.s.a. (MoM) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.013 |
| Producer Price Index Input n.s.a. (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.103 |
| Producer Price Index Output Core n.s.a. (MoM) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.001 |
| Producer Price Index Output Core n.s.a. (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.024 |
| Producer Price Index Output n.s.a. (MoM) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.004 |
| Producer Price Index Output n.s.a. (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.021 |



| | | | | | |
|---|------------|-------|-----|---|---------|
| Retail Price Index (MoM) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0 |
| Retail Price Index (OCT) | 14-11-2018 | 9:30 | GBP | - | 284.1 |
| Retail Price Index (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.033 |
| Retail Price Index Ex Mort Int.Payments (YoY) (OCT) | 14-11-2018 | 9:30 | GBP | - | 0.033 |
| Foreign Buying Japan Bonds (NOV 9) | 14-11-2018 | 23:50 | JPY | - | - |
| Foreign Buying Japan Stocks (NOV 9) | 14-11-2018 | 23:50 | JPY | - | - |
| Housing Loans (YoY) (3Q) | 14-11-2018 | 23:50 | JPY | - | 0.027 |
| Japan Buying Foreign Bonds (Yen) (NOV 9) | 14-11-2018 | 23:50 | JPY | - | - |
| Japan Buying Foreign Stocks (Yen) (NOV 9) | 14-11-2018 | 23:50 | JPY | - | - |
| Capacity Utilization (MoM) (SEP) | 14-11-2018 | 4:30 | JPY | - | 0.022 |
| Industrial Production (MoM) (SEP F) | 14-11-2018 | 4:30 | JPY | - | (0.011) |
| Industrial Production (YoY) (SEP F) | 14-11-2018 | 4:30 | JPY | - | (0.029) |
| Tertiary Industry Index (MoM) (SEP) | 14-11-2018 | 4:30 | JPY | - | 0.005 |
| MBA Mortgage Applications (NOV 9) | 14-11-2018 | 12:00 | USD | - | (0.04) |
| Consumer Price Index (MoM) (OCT) | 14-11-2018 | 13:30 | USD | - | 0.001 |
| Consumer Price Index (YoY) (OCT) | 14-11-2018 | 13:30 | USD | - | 0.023 |
| Consumer Price Index Core Index s.a. (OCT) | 14-11-2018 | 13:30 | USD | - | 258.441 |
| Consumer Price Index Ex Food and Energy (MoM) (OCT) | 14-11-2018 | 13:30 | USD | - | 0.001 |
| Consumer Price Index Ex Food and Energy (YoY) (OCT) | 14-11-2018 | 13:30 | USD | - | 0.022 |
| Consumer Price Index n.s.a. (OCT) | 14-11-2018 | 13:30 | USD | - | 252.439 |
| Real Avg Hourly Earning (YoY) (OCT) | 14-11-2018 | 13:30 | USD | - | 0.005 |
| Real Avg Weekly Earnings (YoY) (OCT) | 14-11-2018 | 13:30 | USD | - | 0.011 |
| Fed's Quarles to Appear before House Financial Services Panel | 14-11-2018 | 15:00 | USD | - | - |
| Fed's Powell to Discuss Economy at Dallas Fed Event | 14-11-2018 | 23:00 | USD | - | - |

..... End of Report

