



14 Nov.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,840	0.0 %	1.5 %
BSE SENSEX	40,116	(0.6) %	3.2 %
CNX BANK	30,542	0.0 %	0.7 %
CNX MIDCAP	16,699	0.0 %	(8.9) %
CNX SMALLCAP	5,689	0.0 %	(15.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,784	0.3 %	19.1 %
S&P 500	3,094	0.1 %	23.4 %
FTSE 100	7,351	(0.2) %	9.2 %
HANG SENG	26,571	(1.8) %	5.7 %
NIKKEI	23,320	(0.9) %	19.2 %
SHANGHAI COMPOSITE	2,905	(0.3) %	17.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.43	0.6 %	2.9 %
EUR/USD	1.10	0.1 %	(3.8) %
GBP/USD	1.28	0.6 %	0.8 %
USD/JPY	109.14	(0.2) %	(0.4) %
USD/AUD	1.46	0.2 %	2.8 %
USD/SGD	1.36	0.1 %	(0.3) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	0.6 %	22.7 %
Gold(INR/10g)	38,205	0.7 %	21.2 %
Gold Comex(USD/oz)	1,462	0.3 %	13.3 %
SILVER(INR/1Kg)	44,601	1.1 %	16.6 %
Aluminium(USD/MT)	1,768	0.1 %	(4.8) %
Copper(USD/MT)	5,823	(0.3) %	(0.3) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.9	(0.0) %	(0.7) %

**Global Economy:** The US Federal Reserve Chairman Jerome Powell, in a testimony before Congress on Wednesday, reiterated that the central bank is likely to leave interest rates on hold in the near future. Powell told members of the Joint Economic Committee that the Fed would leave rates at their current level unless there is a material change in the economic outlook. Eurozone's industrial production decreased at the slowest pace in four months in September. Industrial production fell 1.7% year-on-year following a 2.8% slump in August. Germany's inflation slowed as initially estimated in October, final data from the Federal Statistical Office showed on Wednesday. The consumer price index rose 1.1% year-on-year in October, after a 1.2% rise in September. UK consumer price inflation eased in October, figures from the Office for National Statistics showed on Wednesday. The consumer price index rose 1.5% year-on-year following a 1.7% gain in September. Japan's producer prices fell at a slower rate in October, data from the Bank of Japan said. The producer price index fell 0.4% year-on-year in October, following a 1.1% decline in September. Australia's wage price growth slowed in the September quarter, figures from the Australian Bureau of Statistics showed. The wages price index climbed a seasonally adjusted 0.5% in the third quarter, after a 0.6% rise in the second quarter. New Zealand's central bank left its key interest unchanged citing downside risks to the economy in the near term amid subdued growth. The Monetary Policy Committee decided to keep the Official Cash Rate (OCR) at 1%.

**Global Equities:** European stocks pulled back on negative global cues as concerns over US-China trade deal weighed.

**Indian Economy:** State Bank of India's economic research team, in the latest edition of 'EcoWrap' has sharply cut India's Gross Domestic Product (GDP) forecast for FY2020 to 5% from 6.1%. It also noted that it expects Q2 GDP growth at 4.2%. The acceleration rate for 33 leading indicators at 85% in October 2018 is down to just 17% in September 2019, with such decline gaining traction from March 2019. The bank expects growth rate to pick up pace in FY21 to 6.2%. SBI notes that domestic growth trends in FY20 should be looked through the prism of synchronized global slowdown and larger rate cuts could be expected from RBI in December policy. However such rate cut is unlikely to lead to any immediate material revival, rather it might result in potential financial instability. First-year premium income of the life insurance sector increased 11.6% to Rs 17271.86 crore in October 2019. The private life insurers reported 9.9% rise in the premium collection at Rs 5849.71 crore, while Life Insurance Corporation (LIC) also showed 12.5% growth to Rs 11422.15 crore in October 2019. During April-October 2019-20, the private insurers reported 19.4% rise in the first-year premium income to Rs 41627.60 crore, and LIC posted 37.7% jump to Rs 101402.37 crore. The overall life insurance first year premium collection increased 31.8% to Rs 143029.96 crore in April-October 2019-20.

**Equity Markets:** Local stocks slipped on continued profit selling after hitting a record high as negative global cues weighed. A deepening global slowdown and contraction in domestic factory output pulled the stocks lower. Benchmark indices closed with significant losses on Wednesday. The Nifty 50 index fell below the 11,850 level. BSE Sensex fell 229.02 points or 0.57% to close at a 40,116.06, as per the provisional closing data. The Nifty 50 index fell 73 points or 0.61% to 11,840.45, as per the provisional closing data.

**Corporate News:** Bharat Heavy Electricals (Bhel) reported 40.74% rise in consolidated net profit to Rs 121.70 crore on 8.18% fall in total income to Rs 6367.03 crore in Q2 September 2019 over Q2 September 2018. Bharti Airtel, Grasim Industries, Vedanta and ONGC will unveil their quarterly results today, 14 November 2019. Indiabulls Housing Finance said that the company has made timely payment of interest / principal (as the case may be) in respect of Secured Redeemable Non- Convertible Debentures (NCDs) issued by company, on private placement basis.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	221.1	228.1	33.3
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)	1,370,347	1,252,668	1,342,118

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.9	16.0
NSE VIX	16.5	15.9	17.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,542	(1.8) %	0.7 %	Energy	15,963	0.2 %	(3.4) %
IT	15,241	(0.4) %	(3.8) %	Pharma	7,660	(1.6) %	(18.3) %
Metals	2,557	(2.0) %	(17.6) %	Finance	13,806	(1.2) %	10.5 %
Auto	8,150	(0.1) %	(3.1) %	PSU	2,384	(3.1) %	(29.6) %
FMCG	31,582	(0.7) %	4.6 %	Real Estate	278	(1.8) %	4.2 %

### 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>
HDFC AMC	3,596	7.4 %	131.1 %	Indiabulls	218	(8.5) %	(74.2) %
Britannia	3,270	4.8 %	7.2 %	Vodafone I	4	(7.5) %	(79.2) %
TCS	2,179	3.7 %	7.2 %	Yes Bank	68	(6.6) %	(75.3) %
HDFC Life	589	3.2 %	53.5 %	GAIL (Indi	124	(5.0) %	(30.2) %
Reliance I	1,472	3.1 %	5.8 %	Zee Entert	291	(4.9) %	(32.7) %

### 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>					

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