



15 Nov.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,581	0.0 %	3.6 %
BSE SENSEX	35,142	(0.0) %	5.7 %
CNX BANK	25,946	0.1 %	6.6 %
CNX MIDCAP	17,500	0.1 %	(8.4) %
CNX SMALLCAP	6,267	0.1 %	(21.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,081	(0.8) %	1.0 %
S&P 500	2,702	(0.8) %	0.2 %
FTSE 100	7,034	(0.3) %	(8.0) %
HANG SENG	25,654	(0.5) %	(15.9) %
NIKKEI	21,846	0.2 %	(7.1) %
SHANGHAI COMPOSITE	2,632	(0.9) %	(21.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.31	(0.8) %	13.6 %
EUR/USD	1.13	0.8 %	(5.7) %
GBP/USD	1.30	1.1 %	(3.8) %
USD/JPY	113.56	(0.2) %	0.7 %
USD/AUD	1.38	(1.3) %	7.5 %
USD/SGD	1.38	(0.5) %	3.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(7.1) %	(7.8) %
Gold(INR/10g)	30,759	(0.4) %	4.8 %
Gold Comex(USD/oz)	1,205	(0.4) %	(8.0) %
SILVER(INR/1Kg)	36,105	(1.0) %	(6.5) %
Aluminium(USD/MT)	1,925	(0.5) %	(14.7) %
Copper(USD/MT)	6,130	0.8 %	(14.6) %

**FIXED INCOME**

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

**Global Economy:** The US Labor Department said its consumer price index rose by 0.3% in October after edging up by 0.1% in September. The annual rate of consumer price growth accelerated to 2.5% in October from 2.3% in September. Germany's economy contracted at a sharp pace in the third quarter, marking the first decline since the first three months of 2015, preliminary figures from the Federal Statistical Office showed on Wednesday. Gross domestic product declined a seasonally adjusted 0.2% in the three months to September, after expanding 0.5% in the second quarter. UK inflation remained unchanged in October. The consumer price index rose 2.4% year-on-year, same as in September, figures from the Office for National Statistics showed on Wednesday. China's credit growth slowed sharply in October, indicating that the economy might be on a continued moderation path. While October is typically a slow month for Chinese credit, growth in key gauges such as total social financing and money supply fell to record lows. Chinese banks extended 697 billion yuan in net new yuan loans in October, latest central bank data showed. Japan's economy contracted in the third quarter on natural disasters and a decline in exports. GDP contracted by 1.2% following 3% annualized growth in the previous quarter.

**Global Equities:** European stocks fell sharply as weak GDP data from Japan and Germany weighed on the sentiments. Global stocks have been lax this week on sluggish global economic growth trend.

**Indian Economy:** India's inflation based on wholesale prices rose to a four-month high of 5.28% in October, mainly due to spike in petrol and diesel prices, even as food prices softened. The Wholesale Price Index (WPI)-based inflation stood at 5.13% in September and 3.68% in October last year. According to the government data released Wednesday, food articles witnessed softening of prices with deflation at 1.49% in October, against 0.21% in September.

**Equity Markets:** Key benchmark indices ended with minor losses amid divergent trend in index pivotals. Intraday volatility was high as the Sensex and the Nifty, both, alternately swung between positive and negative zone throughout the trading session. Gains triggered by steep fall in crude oil prices were offset by weak global cues. Most IT shares declined after the rupee edged higher against the dollar. Public sector oil marketing companies (PSU OMCs) gained after overnight slide in crude oil prices.

**Corporate News:** Grasim Industries reported consolidated net loss of Rs 1299.86 crore in Q2 September 2018 as compared with net profit of Rs 799.03 crore in Q2 September 2017. Total income rose 23.34% to Rs 17096.47 crore. Vodafone Idea reported consolidated net loss of Rs 4793.80 crore in Q2 September 2018 as compared with net loss of Rs 1106.60 crore in Q2 September 2017. Total income rose 4.29% to Rs 7920.90 crore. Nalco announced share buyback offer worth Rs 505 crore. Nalco said it has extensive plans for brown field and green field expansion. Mahindra and Mahindra reported a net profit of Rs 1,778.75 crore for the September quarter, recording a jump of 26%. The total revenue increased to Rs 12,790.17 crore during the quarter, rising 6% year on year. India will be spending \$89.2 billion on information technology in 2019, showing a growth of 6.7% over \$83.6 billion that it expected to spend in 2018, research firm Gartner stated. It also said that the growth will come from digital business transformation initiatives in both the public and private organisations.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	128.6	24.0	(51.0)
MF(INR cr)	411.0	(22.3)	483.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,389	28,583	35,072
F&O(INR cr)	1,000,275	920,938	968,895

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.0	18.7	15.1
NSE VIX	18.8	18.7	14.5

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,930	0.6 %	6.6 %	Energy	14,161	0.5 %	6.5 %
IT	14,338	(2.4) %	12.8 %	Pharma	9,216	(2.2) %	6.9 %
Metals	3,382	(0.8) %	(4.4) %	Finance	10,935	0.6 %	6.6 %
Auto	9,051	(0.8) %	(18.1) %	PSU	2,924	2.0 %	2.4 %
FMCG	29,048	0.9 %	9.6 %	Real Estate	218	(1.5) %	(26.4) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	1,048	7.5 %	(21.1) %	Ashok Leyl	107	(10.5) %	(28.1) %
H P C L	244	4.7 %	(29.3) %	Motherson	153	(7.9) %	(29.0) %
Cadila Hea	371	4.5 %	(3.6) %	Sun Pharma	520	(7.4) %	2.4 %
Godrej Con	713	4.3 %	(4.1) %	DLF	163	(5.1) %	(19.1) %
B P C L	316	4.2 %	(25.4) %	ICICI Pru	337	(5.1) %	(12.5) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (NOV)	15-11-2018	0:00	AUD	-	0.04
Employment Change (OCT)	15-11-2018	0:30	AUD	-	-
Full Time Employment Change (OCT)	15-11-2018	0:30	AUD	-	-
Part Time Employment Change (OCT)	15-11-2018	0:30	AUD	-	-
Participation Rate (OCT)	15-11-2018	0:30	AUD	-	0.654
RBA Foreign Exchange Transaction (Australian dollar) (OCT)	15-11-2018	0:30	AUD	-	-
RBA FX Transactions Government (OCT)	15-11-2018	0:30	AUD	-	-
RBA FX Transactions Other (OCT)	15-11-2018	0:30	AUD	-	-
Unemployment Rate (OCT)	15-11-2018	0:30	AUD	-	0.05
RBA's Debelle speaks on panel in Melbourne	15-11-2018	1:30	AUD	-	-
ADP Publishes October Payrolls Report	15-11-2018	13:30	CAD	-	-
Teranet/National Bank HP Index (OCT)	15-11-2018	13:30	CAD	-	226.23
Teranet/National Bank HPI (MoM) (OCT)	15-11-2018	13:30	CAD	-	0
Teranet/National Bank HPI (YoY) (OCT)	15-11-2018	13:30	CAD	-	0.021
Existing Home Sales (MoM) (OCT)	15-11-2018	14:00	CAD	-	(0.004)
New Home Prices (MoM) (OCT)	15-11-2018	1:30	CNY	-	0.01
Euro-Zone Trade Balance (euros) (SEP)	15-11-2018	10:00	EUR	-	-
Euro-Zone Trade Balance s.a. (SEP)	15-11-2018	10:00	EUR	-	-
ECB's Coeure Speaks in Basel	15-11-2018	12:15	EUR	-	-
ECB's Praet Speaks in Brussels	15-11-2018	13:10	EUR	-	-
ECB Vice President de Guindos Speaks in Amsterdam	15-11-2018	14:35	EUR	-	-
EU 25 New Car Registrations (OCT)	15-11-2018	7:00	EUR	-	(0.235)
Retail Sales Ex Auto Fuel (MoM) (OCT)	15-11-2018	9:30	GBP	-	(0.008)
Retail Sales Ex Auto Fuel (YoY) (OCT)	15-11-2018	9:30	GBP	-	0.032
Retail Sales Inc Auto Fuel (MoM) (OCT)	15-11-2018	9:30	GBP	-	(0.008)
Retail Sales Inc Auto Fuel (YoY) (OCT)	15-11-2018	9:30	GBP	-	0.03
Tokyo Condominium Sales (YoY) (OCT)	15-11-2018	3:00	JPY	-	0.132
Overnight Rate (NOV 15)	15-11-2018	19:00	MXN	-	0.0775
BusinessNZ Manufacturing PMI (OCT)	15-11-2018	21:00	NZD	-	51.7



Continuing Claims (NOV 3)	15-11-2018	13:30	USD	-	-
Empire Manufacturing (NOV)	15-11-2018	13:30	USD	-	21.1
Export Price Index (MoM) (OCT)	15-11-2018	13:30	USD	-	0
Export Price Index (YoY) (OCT)	15-11-2018	13:30	USD	-	0.027
Import Price Index (MoM) (OCT)	15-11-2018	13:30	USD	-	0.005
Import Price Index (YoY) (OCT)	15-11-2018	13:30	USD	-	0.035
Import Price Index ex Petroleum (MoM) (OCT)	15-11-2018	13:30	USD	-	0
Initial Jobless Claims (NOV 10)	15-11-2018	13:30	USD	-	-
Philadelphia Fed Business Outlook (NOV)	15-11-2018	13:30	USD	-	22.2
Retail Sales Advance (MoM) (OCT)	15-11-2018	13:30	USD	-	0.001
Retail Sales Control Group (OCT)	15-11-2018	13:30	USD	-	0.005
Retail Sales Ex Auto (MoM) (OCT)	15-11-2018	13:30	USD	-	(0.001)
Retail Sales Ex Auto and Gas (OCT)	15-11-2018	13:30	USD	-	0
Business Inventories (SEP)	15-11-2018	15:00	USD	-	0.005
Fed's Quarles to Appear before Senate Banking Panel	15-11-2018	15:00	USD	-	-
EIA Natural Gas Storage Change (NOV 9)	15-11-2018	15:30	USD	-	65
EIA Working Natural Gas Implied Flow (NOV 9)	15-11-2018	15:30	USD	-	65
DOE Cushing OK Crude Inventory (NOV 9)	15-11-2018	16:00	USD	-	-
DOE U.S. Crude Oil Inventories (NOV 9)	15-11-2018	16:00	USD	-	-
DOE U.S. Distillate Inventory (NOV 9)	15-11-2018	16:00	USD	-	-
DOE U.S. Gasoline Inventories (NOV 9)	15-11-2018	16:00	USD	-	-
Fed's Powell Reviews Post-Hurricane Harvey Recovery Efforts	15-11-2018	16:30	USD	-	-
Fed's Bostic Speaks in Madrid	15-11-2018	18:00	USD	-	-
Fed's Kashkari Speaks to Minnesota AgriGrowth Council	15-11-2018	20:00	USD	-	-

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

