



15 Nov.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,872	0.0 %	1.7 %
BSE SENSEX	40,286	0.4 %	3.8 %
CNX BANK	30,750	0.0 %	1.4 %
CNX MIDCAP	16,751	0.0 %	(8.6) %
CNX SMALLCAP	5,685	0.0 %	(15.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,782	(0.0) %	19.1 %
S&P 500	3,097	0.1 %	23.5 %
FTSE 100	7,293	(0.8) %	8.3 %
HANG SENG	26,324	(0.9) %	4.7 %
NIKKEI	23,142	(0.8) %	18.3 %
SHANGHAI COMPOSITE	2,910	0.2 %	18.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.76	0.7 %	3.3 %
EUR/USD	1.10	(0.2) %	(3.9) %
GBP/USD	1.28	0.1 %	0.8 %
USD/JPY	108.92	(0.1) %	(0.6) %
USD/AUD	1.46	0.3 %	3.0 %
USD/SGD	1.36	0.1 %	(0.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	(0.6) %	22.0 %
Gold(INR/10g)	38,217	0.0 %	21.2 %
Gold Comex(USD/oz)	1,469	0.4 %	13.8 %
SILVER(INR/1Kg)	44,830	0.5 %	17.2 %
Aluminium(USD/MT)	1,756	(0.7) %	(5.5) %
Copper(USD/MT)	5,835	0.2 %	(0.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	(0.1) %	(0.8) %

**Global Economy:** The US Labor Department said its producer price index for final demand rose by 0.4% in October after falling by 0.3% in September. China's industrial production rose 4.7% year-on-year in October, data from the National Bureau of Statistics showed today. Value of delivered industrial exports fell 3.8% on-year in October, recording third straight month of declines. China's fixed asset investment edged up 5.2% in January-October 2019 – around two decade low. China's retail sales of consumer goods rose 8.1% year on year in the January-October period, the National Bureau of Statistics said. Germany's gross domestic product grew a seasonally and calendar adjusted 0.1% from the previous three months, provisional data from the statistical office Destatis showed on Thursday. The contraction in the second quarter was revised to 0.2% from 0.1%. Japan's gross domestic product grew an annualized 0.2% quarterly following a revised 1.8% expansion in the second quarter. On a quarter-on-quarter basis, GDP edged up 0.1% after a 0.4% gain in the previous three months. The latest pace of expansion was the weakest since the third quarter of 2018. Japan's tertiary industry activity index rose 1.8% month-on-month in September, data from the Ministry of Economy, Trade and Industry showed on Thursday. On a yearly basis, tertiary industry activity advanced 3.8% in September. Australia's jobless rate rose to a seasonally adjusted 5.3% in October from 5.2% in September.

**Global Equities:** Sentiments remained mixed on lack of clarity on the US-China trade front

**Indian Economy:** Moody's Investors Service cut India's economic growth forecast for current year to 5.6% from 5.8% estimated earlier, according to media reports. It has forecast slower real GDP growth of 5.6% in 2019, from 7.4% in 2018. It expects economic activity to pick up in 2020 and 2021 to 6.6% and 6.7% respectively, but the pace is set to remain lower than in the recent past. India's retail inflation for the month of October breached the Reserve Bank of India's (RBI) medium-term target of 4% for the first time since July 2018 due to higher food prices. Wholesale Price Index (WPI)-based inflation, base year 2011-12, dipped further down to 40-months low of 0.2% in October 2019 from 0.3% in September 2019. The WPI based inflation has been moderating consistently for last six straight months from 3.2% in April 2019.

**Equity Markets:** Key equity barometers ended with decent gains on Thursday after oscillating between gains and losses for the first half of the trading session. The Nifty 50 index managed to close above the 11,850 level. Trading was volatile due to weekly expiry of index options. Sentiment was embittered after Moody's cuts India's GDP growth forecast to 5.6% for 2019. BSE Sensex rose 170.42 points or 0.42% to close at a 40,286.48, as per the provisional closing data. The Nifty 50 index rose 30 points or 0.25% to 11,870.45, as per the provisional closing data.

**Corporate News:** Vodafone Idea said its consolidated net loss in the second quarter widened to Rs. 50,922 crore - it's biggest ever, while Airtel also reported a net loss of Rs. 23,044.9 crore. Natco Pharma Limited announced that its Finished Dosage Formulations (FDF) facility in Visakhapatnam has commenced commercial operations. The facility is a part of the Special Economic Zone (SEZ) and intended to cater primarily to the U.S. & other international markets. Wipro would be in focus. Topcoder, a Wipro company unveiled Talent-as-a-Service (TaaS) at the 2019 Topcoder Open and Innovation Summit in Houston, USA. TaaS is an innovative open workforce model that provides highly skilled technology talent on-demand and empowers enterprise teams to scale quickly with proven resources from anywhere in the world.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	211.8	226.1	34.4
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)	3,159,830	1,464,575	1,354,155

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.7	16.0
NSE VIX	15.7	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	30,750	0.7 %	1.4 %	Energy	15,905	(0.4) %	(3.8) %
IT	15,389	1.0 %	(2.9) %	Pharma	7,591	(0.9) %	(19.0) %
Metals	2,507	(2.0) %	(19.2) %	Finance	13,947	1.0 %	11.6 %
Auto	8,191	0.5 %	(2.7) %	PSU	2,379	(0.2) %	(29.7) %
FMCG	31,439	(0.5) %	4.1 %	Real Estate	278	(0.2) %	3.9 %

### 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>
New India	158	5.0 %	(16.2) %	Vodafone I	3	(20.3) %	(83.4) %
Cadila Hea	234	4.2 %	(32.0) %	Aurobindo	396	(8.8) %	(50.0) %
DLF	209	3.3 %	6.8 %	Bharti Inf	209	(4.4) %	(33.6) %
Ambuja Cem	201	2.7 %	(14.5) %	Indiabulls	211	(3.2) %	(75.1) %
Interglobe	1,517	2.7 %	7.1 %	Vedanta	144	(3.0) %	(23.8) %

### 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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