



16 Nov.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,617	0.4 %	4.0 %
BSE SENSEX	35,261	0.3 %	6.0 %
CNX BANK	26,155	0.9 %	7.5 %
CNX MIDCAP	17,569	0.5 %	(8.0) %
CNX SMALLCAP	6,269	0.1 %	(20.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,289	0.8 %	1.9 %
S&P 500	2,730	1.1 %	1.3 %
FTSE 100	7,038	0.1 %	(8.0) %
HANG SENG	26,103	1.8 %	(14.5) %
NIKKEI	21,804	(0.2) %	(7.2) %
SHANGHAI COMPOSITE	2,668	1.4 %	(20.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.31	(0.5) %	13.6 %
EUR/USD	1.13	0.2 %	(5.7) %
GBP/USD	1.30	(0.1) %	(3.8) %
USD/JPY	113.56	(0.3) %	0.7 %
USD/AUD	1.38	(0.6) %	7.5 %
USD/SGD	1.38	(0.2) %	3.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	1.0 %	(6.8) %
Gold(INR/10g)	30,906	0.5 %	5.3 %
Gold Comex(USD/oz)	1,210	0.5 %	(7.5) %
SILVER(INR/1Kg)	36,490	1.1 %	(5.5) %
Aluminium(USD/MT)	1,931	0.3 %	(14.4) %
Copper(USD/MT)	6,106	(0.4) %	(15.0) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	(0.0) %	0.7 %

**Global Economy:** The US Commerce Department said retail sales advanced by 0.8% in October following a revised 0.1% drop in September. The Philly Fed said its diffusion index for current general activity tumbled to 12.9 in November from 22.2 in September, though a positive reading still indicates growth. The US initial jobless claims inched up to 216,000, adding 2,000 on the previous week's unrevised level of 214,000. Latest data from the European Automobile Manufacturers Association (ACEA) showed that new car registration in EU decreased by 7.3% year-on-year in October after a 23.5% slump in September. Registrations dropped for a second straight month. The main cause is still the introduction of the new WLTP emissions test on September 1, which resulted in an exceptional surge in registrations over the summer and consequently, demand for new cars fell in most EU countries last month, including the five major markets, the ACEA said. In the main markets, car registrations decreased 7.4% in both Germany and Italy. On a cumulative basis, from January to October, the new car registrations rose 1.6% from a year ago. Australia jobless rate came in at a seasonally adjusted 5% in October, the Australian Bureau of Statistics said on Thursday, unchanged from the September reading.

**Global Equities:** Media reports noted that China has outlined a series of potential concessions to the Trump administration to resolve trade issues. British Prime Minister Theresa May said she had obtained enough support for her proposed Brexit deal to move forward.

**Indian Economy:** Impact of GST on domestic Pharma sector has largely been positive and constructive, informed Minister of State for Road Transport, Highways, Shipping and Chemicals & Fertilizers, Mansukh Mandaviya, in a statement. Before GST, Annual Turnover of the Pharma Sector (as on 31.05.2017) was Rs 1,14,231 crores while after GST, the Annual Turnover of Pharma sector (as on 31.05.2018) touched Rs 1,31,312 crores, which is 6% higher than the Pre-GST regime. Hardeep Singh Puri, Minister of State (I/C) of Housing and Urban Affairs, has said that in this new era of RERA, the country is witnessing positive transformative changes in the industry. In the 2nd year of the implementation of RERA, all the States/UTs have notified Rules under RERA except for 6 North Eastern States and the state of West Bengal. The micro, small and medium enterprises (MSMEs) are facing additional challenges in accessing credit due to the recent liquidity crunch in the economy impacting their working capital and term loan needs, noted the CII in a latest update.

**Equity Markets:** Domestic shares ended with modest gains as recent weakness in crude oil prices kept investor sentiment upbeat. The barometer index, the S&P BSE Sensex, rose 118.55 points or 0.34% to 35,260.54, as per the provisional closing data. The Nifty 50 index rose 40.40 points or 0.38% to 10,616.70, as per the provisional closing data. Mostly positive global shares also supported bourses.

**Corporate News:** Yes Bank could be under sustained pressure. Yes Bank lost more than 7% yesterday after Ashok Chawla, non-executive independent part-time chairman, tendered his resignation from the Bank's Board, with immediate effect, mentioning that during the current transition period, the Bank would need a Chairman who could devote more time and attention. Global rating agency S&P said it's 'BB' long-term and 'B' short-term issuer credit ratings on IDBI Bank continues to remain on credit watch with negative implications, due to uncertainty on the lender's ability to meet capital requirements. India's consumption of Copper metal is expected to rise to 1.433 million tonnes by 2026 from around 650,000 tonnes in 2018, Birla Copper Chief Executive Officer J C Laddha told delegates at the Asia Copper Conference in Shanghai, according to media reports. NIIT Technologies announced a global partnership with enterprise blockchain software firm R3 to develop innovative solutions for Banking and Financial Services, Insurance and Travel and Transportation verticals on R3's Corda, an open-source blockchain platform.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	24.6	24.1	(50.5)
MF(INR cr)	411.0	(22.3)	483.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,563	29,181	35,069
F&O(INR cr)	1,560,702	992,023	972,714

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.3	19.0	15.1
NSE VIX	18.5	18.6	14.5

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,155	0.9 %	7.5 %	Energy	14,131	(0.2) %	6.3 %
IT	14,354	0.1 %	13.0 %	Pharma	9,219	0.0 %	6.9 %
Metals	3,408	0.8 %	(3.7) %	Finance	11,055	1.1 %	7.7 %
Auto	9,108	0.6 %	(17.6) %	PSU	2,943	0.6 %	3.1 %
FMCG	29,021	(0.1) %	9.5 %	Real Estate	222	1.7 %	(25.2) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bandhan Ba	460	6.0 %	(3.4) %	Vodafone I	37	(10.9) %	(52.6) %
Siemens	933	5.3 %	(15.3) %	Grasim Ind	809	(7.7) %	(25.8) %
DLF	170	4.4 %	(15.5) %	Yes Bank	206	(7.4) %	(32.8) %
Adani Port	346	4.3 %	(6.4) %	Motherson	144	(6.3) %	(33.4) %
Shree Ceme	15,858	3.7 %	(3.4) %	Indiabulls	805	(4.1) %	(35.3) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
International Securities Transactions (Canadian dollar) (SEP)	16-11-2018	13:30	CAD	-	-
Manufacturing Sales (MoM) (SEP)	16-11-2018	13:30	CAD	-	(0.004)
Euro-Zone Consumer Price Index (MoM) (OCT)	16-11-2018	10:00	EUR	-	0.005
Euro-Zone Consumer Price Index (YoY) (OCT F)	16-11-2018	10:00	EUR	-	0.021
Euro-Zone Consumer Price Index Core (YoY) (OCT F)	16-11-2018	10:00	EUR	-	0.011
Bundesbank President Weidmann Speaks in Frankfurt	16-11-2018	13:00	EUR	-	-
German Wholesale Price Index (MoM) (OCT)	16-11-2018	7:00	EUR	-	0.004
German Wholesale Price Index (YoY) (OCT)	16-11-2018	7:00	EUR	-	0.035
ECB President Draghi Speaks in Frankfurt	16-11-2018	8:30	EUR	-	-
BOJ Outright Bond Purchase 10~25 Years	16-11-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	16-11-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	16-11-2018	1:10	JPY	-	-
Non Resident Bond Holdings (OCT)	16-11-2018	2:00	NZD	-	-
Capacity Utilization (OCT)	16-11-2018	14:15	USD	-	0.781
Industrial Production (MoM) (OCT)	16-11-2018	14:15	USD	-	0.003
Manufacturing (SIC) Production (OCT)	16-11-2018	14:15	USD	-	0.002
Kansas City Fed Manf. Activity (NOV)	16-11-2018	16:00	USD	-	8
Fed's Evans Speaks at Fixed Income Forum Roundtable	16-11-2018	16:30	USD	-	-
Baker Hughes U.S. Rig Count (NOV 16)	16-11-2018	18:00	USD	-	1081
Net Long-term TIC Flows (SEP)	16-11-2018	21:00	USD	-	-
Total Net TIC Flows (SEP)	16-11-2018	21:00	USD	-	-

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