



20 Nov.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,763	0.0 %	5.4 %
BSE SENSEX	35,775	0.9 %	7.5 %
CNX BANK	26,301	0.0 %	8.1 %
CNX MIDCAP	17,592	0.0 %	(7.9) %
CNX SMALLCAP	6,280	0.0 %	(20.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,017	(1.6) %	0.8 %
S&P 500	2,691	(1.7) %	(0.2) %
FTSE 100	7,001	(0.2) %	(8.5) %
HANG SENG	26,372	0.7 %	(13.6) %
NIKKEI	21,821	0.7 %	(7.2) %
SHANGHAI COMPOSITE	2,704	0.9 %	(19.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.66	(0.5) %	12.5 %
EUR/USD	1.14	1.0 %	(4.7) %
GBP/USD	1.29	0.5 %	(4.9) %
USD/JPY	112.61	(0.7) %	(0.1) %
USD/AUD	1.37	(0.1) %	7.3 %
USD/SGD	1.37	(0.3) %	2.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	0.0 %	(6.5) %
Gold(INR/10g)	30,918	0.0 %	5.3 %
Gold Comex(USD/oz)	1,222	0.6 %	(6.6) %
SILVER(INR/1Kg)	36,859	0.3 %	(4.5) %
Aluminium(USD/MT)	1,914	(0.2) %	(15.2) %
Copper(USD/MT)	6,181	(0.1) %	(13.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	(0.1) %	0.6 %

**Global Economy:** The US home builder sentiment recorded its steepest one-month drop in over 4-1/2 years in November as rising mortgage rates and tight home inventory squeezed the real estate sector, the National Association of Home Builders said on Monday. The NAHB and Wells Fargo housing market index fell to 60 points in November compared with a reading of 68 in October. Eurozone current account surplus fell to EUR 17 billion from EUR 24 billion in August. In the same month last year, the surplus was EUR 40 billion. The goods trade surplus decreased to EUR 16 billion from EUR 22 billion and the services trade surplus was steady at EUR 9 billion. UK house prices declined sharply in November at the fastest monthly pace in seven years, figures from the property market data website Rightmove showed. Average asking prices dropped GBP 5,222 or 1.7 percent month-on-month to GBP 302,023 in November. That was biggest November drop since 2012, Rightmove said. Japan reported a merchandise trade deficit of 449.3 billion yen in October, following the 131.3 billion yen surplus in September. Exports were up 8.2% on year, following the 1.3% decline in the previous month.

**Global Equities:** Sentiments were cautious on Monday amid jitters on US-China trade spat and lack of a clear direction overall following recent volatility.

**Indian Economy:** Acreage under all rabi crops stood at in 191.12 lakh hectare so far this season, down from 227.41 lakh hectare in the year-ago period, down 16%, according to the latest data from the Agricultural Ministry. Acreage under Wheat stood at 51.63 lakh hectare, down around 5% over year. Area under pulses tumbled 18% to 69.95 lakh hectare. Total oilseeds acreage was at 46.85 lakh hectare, down 5.35% while the area under coarse cereals area was 16.27 lakh hectare, down by 45%.

**Equity Markets:** Domestic shares jumped on Monday, on improving risk appetite backed by stability in crude oil prices and foreign portfolio investors turning net buyers of Indian equities in the past few trading sessions. Shares also rallied on hopes that the government and the Reserve Bank of India (RBI) could bury their differences at a crucial central bank board meeting.

**Corporate News:** Bajaj Finserv reported net sales at Rs 9,698.14 crore in September 2018, up 28.26% on year. Net profit was at Rs. 704.01 crore, up 7.93% while the EBITDA was at Rs. 3,402.95 crore, up 30.61%. Asian Paints reported net sales at Rs 4,639.05 crore in September 2018, up 8.76% on year. Net profit was at Rs. 492.76 crore, down 14.44% while EBITDA was at Rs. 847.47 crore, down 0.83%. Jubilant Life Sciences reported net Sales at Rs 2,269.49 crore in September 2018, up 38.23% on year. Net profit was at Rs. 210.41 crore, up 67.7% while EBITDA was at Rs. 454.01, up 44.98%. Adani Ports reported net sales at Rs 2,608.01 crore in September 2018, down 3.63% on year. Net Profit was at Rs. 605.50 crore, down 38.97% while EBITDA was at Rs. 1,447.31 crore, down 29.08%.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	265.2	50.9	(48.5)
MF(INR cr)	(164.1)	0.9	475.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,828	29,996	35,056
F&O(INR cr)	508,453	910,801	967,269

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.1	19.0	15.2
NSE VIX	19.3	18.7	14.6

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,301	0.2 %	8.1 %	Energy	14,466	1.1 %	8.8 %
IT	14,600	0.9 %	14.9 %	Pharma	9,399	1.1 %	9.0 %
Metals	3,395	1.2 %	(4.1) %	Finance	11,129	(0.1) %	8.5 %
Auto	9,208	1.0 %	(16.7) %	PSU	2,980	(0.7) %	4.4 %
FMCG	29,652	1.7 %	11.9 %	Real Estate	226	1.7 %	(23.7) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	205	7.2 %	(33.1) %	Indiabulls	734	(4.2) %	(41.0) %
Dabur Indi	409	3.2 %	21.6 %	Siemens	942	(4.1) %	(14.5) %
Ashok Leyl	109	3.1 %	(26.5) %	New India	204	(3.1) %	(42.2) %
ITC	285	2.9 %	10.2 %	HDFC Stand	384	(2.4) %	(20.4) %
Tata Motor	185	2.6 %	(45.6) %	Oracle Fin	3,490	(2.3) %	(11.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Meeting Minutes (NOV 6)	20-11-2018	00:30	AUD	-	-
RBA's Lowe gives speech in Melbourne	20-11-2018	08:20	AUD	-	-
Westpac Leading Index (MoM) (OCT)	20-11-2018	23:30	AUD	-	(0.001)
Bank of Canada's Carolyn Wilkins Speaks In Montreal	20-11-2018	17:45	CAD	-	-
Bank of Canada's Wilkins Speech in Montreal	20-11-2018	18:00	CAD	-	-
Exports (MoM) (OCT)	20-11-2018	07:00	CHF	-	(0.008)
Imports (MoM) (OCT)	20-11-2018	07:00	CHF	-	(0.004)
Swiss Watch Exports (YoY) (OCT)	20-11-2018	07:00	CHF	-	(0.069)
German Producer Price Index (MoM) (OCT)	20-11-2018	07:00	EUR	-	0.005
German Producer Price Index (YoY) (OCT)	20-11-2018	07:00	EUR	-	0.032
BOE's Carney, Haldane, Cunliffe and Saunders Testify in London	20-11-2018	10:00	GBP	-	-
CBI Trends Selling Prices (NOV)	20-11-2018	11:00	GBP	-	10
CBI Trends Total Orders (NOV)	20-11-2018	11:00	GBP	-	(6)
Convenience Store Sales (YoY) (OCT)	20-11-2018	07:00	JPY	-	0.035
Building Permits (MoM) (OCT)	20-11-2018	13:30	USD	-	(0.006)
Building Permits (OCT)	20-11-2018	13:30	USD	-	-
Housing Starts (MoM) (OCT)	20-11-2018	13:30	USD	-	(0.053)
Housing Starts (OCT)	20-11-2018	13:30	USD	-	-
U.S. to Sell 4-Week Bills	20-11-2018	16:30	USD	-	-
U.S. to Sell 8-Week Bills	20-11-2018	16:30	USD	-	-

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