



20 Nov.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,017	0.6 %	3.0 %
BSE SENSEX	40,470	0.5 %	4.8 %
CNX BANK	31,236	0.0 %	3.0 %
CNX MIDCAP	16,968	0.0 %	(7.4) %
CNX SMALLCAP	5,710	0.0 %	(15.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,934	(0.4) %	19.7 %
S&P 500	3,120	(0.1) %	24.5 %
FTSE 100	7,324	0.2 %	8.8 %
HANG SENG	27,094	1.6 %	7.8 %
NIKKEI	23,293	(0.5) %	19.1 %
SHANGHAI COMPOSITE	2,934	0.9 %	19.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.63	(0.2) %	3.2 %
EUR/USD	1.11	0.6 %	(3.3) %
GBP/USD	1.29	0.7 %	1.5 %
USD/JPY	108.79	0.2 %	(0.8) %
USD/AUD	1.47	(0.3) %	3.3 %
USD/SGD	1.36	(0.1) %	(0.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(3.5) %	18.3 %
Gold(INR/10g)	38,069	0.4 %	20.7 %
Gold Comex(USD/oz)	1,474	0.2 %	14.2 %
SILVER(INR/1Kg)	44,728	1.5 %	16.9 %
Aluminium(USD/MT)	1,735	(0.5) %	(6.6) %
Copper(USD/MT)	5,822	(0.1) %	(0.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	(0.0) %	(0.9) %

Global Economy: The US Commerce Department said housing starts surged up by 3.8% to an annual rate of 1.314 million in October after plunging by 7.9% to a revised rate of 1.266 million in September. Eurozone's construction output rose for the first time in three months, data from Eurostat showed on Tuesday. Construction output grew 0.7% in September, reversing a 0.8% fall in August. Euro area current account surplus declined in September largely due to the fall in primary income, data from the European Central Bank showed Tuesday. The current account surplus totaled EUR 28 billion in September versus EUR 29 billion in August. Europe's passenger car sales increased to the highest October level on record since 2009. Car registrations grew 8.7% from last year to hit 1.17 million units in October. Bank of Japan Governor Haruhiko Kuroda said on Tuesday that the central bank still has room to lower interest rates further. According to the minutes of the latest Monetary Policy Meeting of the Reserve Bank of Australia (RBA), the outlook for the Australian economy was little changed since August. After a soft period in the second half of 2018, GDP growth had picked up a little in the first half of 2019 and it appeared that a gentle turning point had been reached. Looking forward, growth was expected to strengthen gradually to 2.75% over 2020 and around 3% over 2021.

Global Equities: US stocks saw mixed action as President Donald Trump threatened higher tariffs on Chinese goods if an agreement is not reached.

Indian Economy: According to the Federation of Automobile Dealers Association (FADA), the October vehicle registrations data showed positive momentum with the biggest 2 festivals of Navratri/Dussehra and Diwali being in the same month. Never before seen attractive offers boosted the overall positive mood of the buyers says FADA. On a YoY basis, overall vehicle registrations rose by 4%. 2-Wheeler registrations were up 5%, 3-Wheeler were up 4%, PV were up 11% and CV registered de-growth of -23%. On inventory front, PV inventory, already being at reasonable levels, saw a further marginal drop reaching the ideal mark. CV inventory also reduced but still remains above comfortable levels heading into the BS6 implementation.

Equity Markets: Local markets ended with decent gains after a volatile session on Tuesday. Media updates on the PSU disinvestment front led to heavy buying momentum in the last hour of trade. Telecom shares shot up on proposals to raise tariffs from December. Bharti Airtel hit 52-week high. Index heavyweight Reliance Industries hit a record high. The barometer index, the BSE Sensex, rose 185.51 points or 0.46% to 40,469.70. The Nifty 50 index rose 55.60 points or 0.47% to 11,940.10.

Corporate News: Shares of Reliance Industries (RIL) will be in focus. Reliance Jio Infocomm (Jio), a subsidiary of RIL said it will also work with the government and comply with the regulatory regime to strengthen the industry to benefit Indian consumers and take measures including appropriate increase in tariffs in next few weeks in a manner that does not adversely impact data consumption or growth in digital adoption and sustains investments. Wipro signed a Memorandum of Understanding (MoU) with the University of Oulu, Finland, to collaborate in the areas of wireless communications in 5G/6G at GHz, THz and light wave frequencies under the University's 6G flagship program. Siemens reported 18.28% rise in consolidated net profit to Rs 333.90 crore on 6.38% rise in total income to Rs 4,290.10 crore in Q4 September 2019 over Q4 September 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(73.8)	137.5	31.9
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)	45,641	42,154	36,350
F&O(INR cr)	985,925	1,315,274	1,344,673

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.3	16.0
NSE VIX	15.4	15.7	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	31,236	0.8 %	3.0 %	Energy	16,114	1.5 %	(2.5) %
IT	15,305	0.1 %	(3.4) %	Pharma	7,851	0.4 %	(16.3) %
Metals	2,518	(0.9) %	(18.8) %	Finance	14,009	0.0 %	12.1 %
Auto	8,064	(0.7) %	(4.2) %	PSU	2,589	3.9 %	(23.5) %
FMCG	30,973	(0.6) %	2.6 %	Real Estate	278	0.1 %	4.1 %

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>
Vodafone I	6	36.0 %	(65.9) %	SBI Life I	937	(6.3) %	56.6 %
Bharti Inf	251	10.5 %	(20.3) %	Bandhan Ba	536	(4.0) %	1.2 %
Bharti Air	439	7.4 %	40.4 %	ICICI Pru	505	(3.0) %	39.3 %
General In	256	4.4 %	4.0 %	Zee Entert	286	(2.8) %	(33.8) %
HDFC AMC	3,584	4.0 %	130.3 %	Yes Bank	64	(2.6) %	(76.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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