



21 Nov.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,299	0.1 %	11.5 %
BSE SENSEX	33,360	0.1 %	11.5 %
CNX BANK	25,769	0.2 %	19.6 %
CNX MIDCAP	19,798	0.8 %	14.2 %
CNX SMALLCAP	8,476	0.5 %	19.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,430	0.3 %	17.8 %
S&P 500	2,582	0.1 %	14.4 %
FTSE 100	7,389	0.1 %	2.9 %
HANG SENG	29,260	0.2 %	32.1 %
NIKKEI	22,262	(0.6) %	13.6 %
SHANGHAI COMPOSITE	3,392	0.3 %	8.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.09	(0.4) %	(3.4) %
EUR/USD	1.17	(0.7) %	10.7 %
GBP/USD	1.32	0.0 %	7.6 %
USD/JPY	112.64	0.1 %	(2.9) %
USD/AUD	1.33	0.8 %	(3.0) %
USD/SGD	1.36	0.3 %	(5.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	2.6 %	8.1 %
Gold(INR/10g)	29,634	0.6 %	6.6 %
Gold Comex(USD/oz)	1,294	0.9 %	11.9 %
SILVER(INR/1Kg)	39,703	0.6 %	2.0 %
Aluminium(USD/MT)	2,077	(1.4) %	22.0 %
Copper(USD/MT)	6,729	(0.5) %	20.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	(0.0) %	(0.1) %

Global Economy: The Conference Board said its leading economic index surged up by 1.2% in October after edging up by a revised 0.1% in September. Eurozone's economic recovery remains strong, but inflation is yet to show a sustained upward trend, and the European Central Bank's decision in October to reduce the size of asset purchases and continue them for another nine months will ensure that the economy is supported by the right amount of monetary stimulus, ECB President Mario Draghi said Monday.

Global Equities: Modest buying continued to emerge in US stocks after recent choppiness. However, traders are cautious amid continued uncertainty about U.S. tax reform and news of political instability in Germany.

Indian Economy: The Central Government has appealed to the Industry Leaders to pass on the benefit of GST Rate reduction to the consumers as it is expected to encourage domestic demand and investment among others. The GST Council in its 23rd Meeting held on 10th November, 2017 at Guwahati, has recommended the reduction of the GST rate from 28% to 18% on goods falling under 178 headings, leaving now only 50 items under the GST slab rate of 28%. Vanaja N. Sarna, Chairperson, Central Board of Excise & Customs (CBEC) has addressed a letter to all the major Fast-Moving Consumer Goods (FMCG) companies pointing out the need to immediately revise the MRP on all the products in which the reduction of GST has been announced by the Council. She has also requested all to give wide publicity to the revised MRP of products.

Equity Markets: Local indices settled with tiny gains after a range-bound and lackluster session of trade amid mostly lower global stocks. Key indices swung between gains and losses in a narrow range around the flat line throughout the session. Market gained for the third straight day. Stocks of public sector banks were mixed while stocks of private sector banks advanced. Realty stocks jumped.

Corporate News: Shares of NBCC (India) and Simplex Infrastructures will be in focus. NBCC (India) said it has awarded the contract for construction of various buildings for IIT Bhubaneswar at Bhubaneswar and its extended campus to Simplex Infrastructures, Kolkata for about Rs 524.12 crore with completion period of 15 months. NBCC will get project management consultancy fee on the same. The Logistics Sector has been granted Infrastructure status. The need for integrated Logistics sector development has been felt for quite some time in view of the fact that the logistics cost in India is very high compared to developed countries. High logistics cost reduces the competitiveness of Indian goods both in domestic as well as export market. This will keep major logistics linked stocks in focus today. Moody's Investors Service upgraded Vedanta Resources' corporate family rating to Ba3 from B1. It has also upgraded the company's senior unsecured bond rating to B2 from B3 while marking the outlook 'stable'.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	221.5	187.3	8.3
MF(INR cr)	2,325.9	478.2	596.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,472	40,201	31,983
F&O(INR cr)	369,323	663,369	605,191

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.4	10.7	11.0
NSE VIX	13.4	13.3	11.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,769	0.2 %	19.6 %	Energy	14,099	1.0 %	19.3 %
IT	11,100	(0.4) %	4.8 %	Pharma	9,143	(0.2) %	(13.0) %
Metals	3,817	1.3 %	22.9 %	Finance	10,478	(0.2) %	18.7 %
Auto	11,285	0.3 %	13.7 %	PSU	4,031	(0.9) %	14.3 %
FMCG	25,855	0.4 %	9.4 %	Real Estate	320	2.1 %	45.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	101	6.2 %	18.8 %	Shree Ceme	17,503	(4.2) %	1.9 %
GAIL (Indi	460	3.5 %	19.6 %	Ambuja Cem	265	(3.6) %	11.4 %
SAIL	81	3.5 %	29.1 %	ACC	1,707	(3.2) %	16.8 %
Tata Power	92	3.1 %	2.8 %	Dr Reddy's	2,274	(2.1) %	(17.1) %
Yes Bank	313	2.4 %	1.8 %	ICICI Bank	319	(2.0) %	22.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Governor Lowe Gives Speech in Sydney	21-11-2017	9:05	AUD	-	-
RBA Nov. Rate Meeting Minutes	21-11-2017	0:30	AUD	-	-
Westpac Leading Index (MoM) (OCT)	21-11-2017	23:30	AUD	-	0.001
Wholesale Trade Sales (MoM) (SEP)	21-11-2017	13:30	CAD	-	0.005
Exports (MoM) (OCT)	21-11-2017	7:00	CHF	-	(0.009)
Imports (MoM) (OCT)	21-11-2017	7:00	CHF	-	(0.032)
Money Supply M3 (YoY) (OCT)	21-11-2017	8:00	CHF	-	0.044
Trade Balance (OCT)	21-11-2017	7:00	CHF	-	-
ECB's Coeure Chairs Panel in Frankfurt	21-11-2017	15:00	EUR	-	-
CBI Trends Selling Prices (NOV)	21-11-2017	11:00	GBP	-	18
CBI Trends Total Orders (NOV)	21-11-2017	11:00	GBP	-	(2)
Central Government NCR (OCT)	21-11-2017	9:30	GBP	-	-
PSNB ex Banking Groups (OCT)	21-11-2017	9:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (OCT)	21-11-2017	9:30	GBP	-	-
Public Sector Net Borrowing (OCT)	21-11-2017	9:30	GBP	-	-
Testimony from BOE's Cunliffe, McCafferty, Saunders, Vlieghe.	21-11-2017	10:00	GBP	-	-
All Industry Activity Index (MoM) (SEP)	21-11-2017	4:30	JPY	-	0.001
Nationwide Department Store Sales (YoY) (OCT)	21-11-2017	5:30	JPY	-	0.044
Supermarket Sales (YoY) (OCT)	21-11-2017	5:00	JPY	-	(0.003)
Tokyo Department Store Sales (YoY) (OCT)	21-11-2017	5:30	JPY	-	0.046
Credit Card Spending (MoM) (OCT)	21-11-2017	2:00	NZD	-	0.007
Credit Card Spending (YoY) (OCT)	21-11-2017	2:00	NZD	-	0.049
Net Migration s.a. (OCT)	21-11-2017	21:45	NZD	-	5190
Chicago Fed Nat Activity Index (OCT)	21-11-2017	13:30	USD	-	0.17
Existing Home Sales (MoM) (OCT)	21-11-2017	15:00	USD	-	0.007
Existing Home Sales (OCT)	21-11-2017	15:00	USD	-	-
Fed's Yellen Speaks at Stern Business School	21-11-2017	23:00	USD	-	-
U.S. to Sell 4-Week Bills	21-11-2017	16:30	USD	-	-
U.S. to Sell USD10 Bln 2 Year Floating Rate Notes	21-11-2017	16:30	USD	-	-



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