



21 Nov.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,667	0.1 %	4.5 %
BSE SENSEX	35,475	(0.8) %	6.5 %
CNX BANK	26,197	0.3 %	7.7 %
CNX MIDCAP	17,494	0.4 %	(8.4) %
CNX SMALLCAP	6,230	0.5 %	(21.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,466	(2.2) %	(1.4) %
S&P 500	2,642	(1.8) %	(2.0) %
FTSE 100	6,948	(0.8) %	(9.2) %
HANG SENG	25,840	(2.0) %	(15.3) %
NIKKEI	21,583	(1.1) %	(8.2) %
SHANGHAI COMPOSITE	2,646	(2.1) %	(21.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.46	(0.6) %	12.2 %
EUR/USD	1.14	(0.4) %	(5.3) %
GBP/USD	1.28	(0.4) %	(5.4) %
USD/JPY	112.89	0.1 %	0.2 %
USD/AUD	1.38	1.4 %	8.2 %
USD/SGD	1.38	0.2 %	3.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(5.9) %	(11.5) %
Gold(INR/10g)	30,913	(0.0) %	5.3 %
Gold Comex(USD/oz)	1,221	(0.1) %	(6.7) %
SILVER(INR/1Kg)	36,752	(0.3) %	(4.8) %
Aluminium(USD/MT)	1,927	0.5 %	(14.6) %
Copper(USD/MT)	6,262	0.0 %	(12.8) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.0 %	0.6 %

Global Economy: The US Commerce Department said housing starts jumped by 1.5% to an annual rate of 1.228 million in October after plummeting by 5.5% to a revised rate of 1.210 million in September. Following September's sharp tumble of 22.49%, the latest figures from the Society of Motor Manufacturers and Traders (SMMT) show that October vehicle registrations in UK were down 2.9% year-on-year. The overall performance of the market is bleak this year with a 7.2% fall being noted in total registrations. According to the minutes of the Monetary Policy Meeting of the Reserve Bank Board held earlier this month, the members noted that growth in Australia's major trading partners had been robust in 2018. Growth was expected to ease a little over the subsequent two years, but to remain above potential in 2019. Growth in the major advanced economies had remained above potential in 2018. Growth in the United States had been strong, supported by the sizeable fiscal stimulus.

Global Equities: Global markets stayed slippery amid broad selling pressure in tech market. The investors are worried about the US China trade spat and persistent signs of slowing economic growth.

Indian Economy: Domestic Sugar production as on 15th November 2018 was 11.63 lakh tons, as compared to 13.73 lakh tons produced as on 15th November, 2017, a latest press release from the Indian Sugar Mills Association (ISMA) stated in a latest update. As expected, crushing for sugar season 2018-19 has started on time. As on 15th November 2018, 238 sugar mills were already crushing sugarcane, as compared to 349 sugar mills which were crushing sugarcane last year on 15th November 2017.

Equity Markets: Local stocks fell sharply yesterday after gaining for three trading sessions following the RBI's decision of easing capital norms. Reserve Bank of India (RBI) said on Monday its board would support small businesses and has extended the timeline for banks to set aside an additional 0.625% as capital conservation buffer by one year to March 31, 2020 to help them to lend more. It has also decided to form an expert committee to look into whether RBI reserves are adequate. The local markets also eyed weak global cues and the selling intensified in the last hour of trade.

Corporate News: Bajaj Finance allotted 200 Secured Redeemable Non- Convertible Debentures (NCDs) of face value of Rs 10 lakh each aggregating to Rs 200 crore on 20 November 2018 on private placement basis. Suzlon Energy has completed the sale of its subsidiaries Amun Solarfarms and Avighna Solarfarms to Canadian Solar Energy. Accordingly, Amun and Avighna cease to be the subsidiaries of the company. Sugar stocks could be in focus. Domestic Sugar production as on 15th November 2018 was 11.63 lakh tons, as compared to 13.73 lakh tons produced as on 15th November, 2017, witnessing a drop of around 15% over year, a latest press release from the Indian Sugar Mills Association (ISMA) stated in a latest update. NMDC Limited has suspended iron ore-mining from its Donimalai mine in Karnataka following the decision of the State government to impose 80% premium on the iron ore sales from the mine, according to a regulatory filing by the public sector undertaking.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	146.7	65.8	(46.2)
MF(INR cr)	65.0	6.2	473.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,348	29,946	35,020
F&O(INR cr)	659,232	889,837	965,319

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	22.5	19.4	15.3
NSE VIX	19.3	18.7	14.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,113	(0.7) %	7.3 %	Energy	14,334	(0.9) %	7.8 %
IT	14,285	(2.2) %	12.4 %	Pharma	9,219	(1.9) %	6.9 %
Metals	3,299	(2.8) %	(6.8) %	Finance	11,043	(0.8) %	7.6 %
Auto	9,134	(0.8) %	(17.4) %	PSU	2,924	(1.9) %	2.4 %
FMCG	29,408	(0.8) %	11.0 %	Real Estate	226	0.0 %	(23.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
GAIL (Indi	344	2.8 %	5.9 %	Yes Bank	192	(6.2) %	(37.3) %
Adani Port	355	1.3 %	(3.9) %	Hindalco I	222	(5.3) %	5.1 %
IndusInd B	1,558	1.3 %	(13.7) %	Bank of Ba	110	(4.5) %	(22.3) %
DLF	175	1.2 %	(13.0) %	Indiabulls	707	(3.7) %	(43.2) %
Oil India	203	1.0 %	(10.7) %	Dabur Indi	394	(3.5) %	17.3 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (OCT)	21-11-2018	00:00	AUD	-	(0.006)
Wholesale Trade Sales (MoM) (SEP)	21-11-2018	13:30	CAD	-	(0.001)
Money Supply M3 (YoY) (OCT)	21-11-2018	08:00	CHF	-	0.023
Istat Releases Economic Forecast for 2018 and 2019	21-11-2018	09:00	EUR	-	-
OECD Economic Outlook	21-11-2018	10:00	EUR	-	-
Central Government NCR (OCT)	21-11-2018	09:30	GBP	-	-
PSNB ex Banking Groups (OCT)	21-11-2018	09:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (OCT)	21-11-2018	09:30	GBP	-	-
Public Sector Net Borrowing (OCT)	21-11-2018	09:30	GBP	-	-
All Industry Activity Index (MoM) (SEP)	21-11-2018	04:30	JPY	-	0.005
Supermarket Sales (YoY) (OCT)	21-11-2018	05:00	JPY	-	0.019
Nationwide Department Store Sales (YoY) (OCT)	21-11-2018	05:30	JPY	-	(0.03)
Tokyo Department Store Sales (YoY) (OCT)	21-11-2018	05:30	JPY	-	0.003
National Consumer Price Index (YoY) (OCT)	21-11-2018	23:30	JPY	-	0.012
National Consumer Price Index Ex-Fresh Food (YoY) (OCT)	21-11-2018	23:30	JPY	-	0.01
Natl Consumer Price Index Ex Fresh Food, Energy (YoY) (OCT)	21-11-2018	23:30	JPY	-	0.004
Foreign Buying Japan Bonds (NOV 16)	21-11-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (NOV 16)	21-11-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (NOV 16)	21-11-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (NOV 16)	21-11-2018	23:50	JPY	-	-
Credit Card Spending (MoM) (OCT)	21-11-2018	02:00	NZD	-	0.008
Credit Card Spending (YoY) (OCT)	21-11-2018	02:00	NZD	-	0.078
Net Migration s.a. (OCT)	21-11-2018	21:45	NZD	-	4640
MBA Mortgage Applications (NOV 16)	21-11-2018	12:00	USD	-	(0.032)
Cap Goods Orders Nondef Ex Air (OCT P)	21-11-2018	13:30	USD	-	(0.001)
Cap Goods Ship Nondef Ex Air (OCT P)	21-11-2018	13:30	USD	-	(0.001)
Continuing Claims (NOV 10)	21-11-2018	13:30	USD	-	-
Durable Goods Orders (OCT P)	21-11-2018	13:30	USD	-	0.007
Durable Ex Transportation (OCT P)	21-11-2018	13:30	USD	-	0



Initial Jobless Claims (NOV 17)	21-11-2018	13:30	USD	-	-
Existing Home Sales (MoM) (OCT)	21-11-2018	15:00	USD	-	(0.034)
Existing Home Sales (OCT)	21-11-2018	15:00	USD	-	-
Leading Index (OCT)	21-11-2018	15:00	USD	-	0.005
U. of Mich. 1 Yr Inflation (NOV F)	21-11-2018	15:00	USD	-	0.028
U. of Mich. 5-10 Yr Inflation (NOV F)	21-11-2018	15:00	USD	-	0.026
U. of Mich. Current Conditions (NOV F)	21-11-2018	15:00	USD	-	113.2
U. of Mich. Expectations (NOV F)	21-11-2018	15:00	USD	-	88.7
U. of Mich. Sentiment (NOV F)	21-11-2018	15:00	USD	-	98.3
DOE Cushing OK Crude Inventory (NOV 16)	21-11-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (NOV 16)	21-11-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (NOV 16)	21-11-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (NOV 16)	21-11-2018	15:30	USD	-	-
U.S. to Sell USD11 Bln 10-Year TIPS Reopening	21-11-2018	16:30	USD	-	-
EIA Natural Gas Storage Change (NOV 16)	21-11-2018	17:00	USD	-	39
EIA Working Natural Gas Implied Flow (NOV 16)	21-11-2018	17:00	USD	-	39
Baker Hughes U.S. Rig Count (NOV 23)	21-11-2018	18:00	USD	-	1082

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