



21 Nov.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,999	0.5 %	2.8 %
BSE SENSEX	40,652	0.4 %	4.6 %
CNX BANK	31,354	0.4 %	3.4 %
CNX MIDCAP	16,994	0.2 %	(7.3) %
CNX SMALLCAP	5,716	0.1 %	(15.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,821	(0.4) %	19.3 %
S&P 500	3,108	(0.4) %	24.0 %
FTSE 100	7,262	(0.8) %	7.8 %
HANG SENG	26,890	(0.8) %	7.0 %
NIKKEI	23,149	(0.6) %	18.3 %
SHANGHAI COMPOSITE	2,911	(0.8) %	18.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.60	0.3 %	3.1 %
EUR/USD	1.11	0.2 %	(3.3) %
GBP/USD	1.29	0.1 %	1.3 %
USD/JPY	108.53	(0.3) %	(1.0) %
USD/AUD	1.47	0.1 %	3.4 %
USD/SGD	1.36	0.1 %	(0.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	3.8 %	22.7 %
Gold(INR/10g)	38,305	0.6 %	21.5 %
Gold Comex(USD/oz)	1,475	0.1 %	14.3 %
SILVER(INR/1Kg)	44,937	0.5 %	17.4 %
Aluminium(USD/MT)	1,748	0.8 %	(5.9) %
Copper(USD/MT)	5,873	0.9 %	0.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	(0.0) %	(0.9) %

Global Economy: The minutes from the US Federal Reserve's monetary policy meeting held in late October were released on Wednesday but did not provide much further insight into the outlook for interest rates. China continued to ease monetary policy as it reduced its new benchmark lending rates today. The one-year loan prime rate was cut to 4.15% from 4.20%. The five-year loan prime rate was also cut to 4.80% from 4.85%, which was the first reduction since the new rate was introduced. Earlier on Monday, the People's Bank of China had lowered the seven-day repurchase rate to 2.50% from 2.55%. Growth of real gross domestic product (GDP) in the OECD area slowed marginally to 0.3% in the third quarter of 2019, compared with 0.4% in the previous quarter, according to provisional estimates. Among the Major Seven economies, the United States recorded the highest annual GDP growth (2.0%), while Italy recorded the lowest annual growth (0.3%). The GDP growth slowed markedly in Japan (to 0.1%, compared to 0.4% in the previous quarter). Year-on-year GDP growth for the OECD area was stable at 1.6% in the third quarter of 2019. OECD data showed that GDP growth was stable in the United States (at 0.5%) and it remained stable in France (at 0.3%) and Italy (at 0.1%) for the third and fourth consecutive quarter, respectively. GDP growth picked-up in the United Kingdom and Germany (to 0.3% and 0.1%, respectively, following a contraction of 0.2% in both countries in the previous quarter?). GDP growth was stable in the euro area (at 0.2%) while it picked-up marginally in the European Union (to 0.3% compared with 0.2% in the previous quarter).

Global Equities: US stocks drifted lower on trade deal uncertainty. DOW fell 0.40% on the day.

Indian Economy: SEBI on Wednesday approved stricter disclosure norms for listed companies on loan defaults and revised its regulations for portfolio managers as well as for rights issue of shares. Sebi also extended the Business Responsibility Report (BRR) requirement to top 1,000 companies, from 500 currently. The number of telephone subscribers in India increased from 1,191.81 million at the end of Aug-19 to 1,195.24 million at the end of Sep-19, thereby showing a monthly growth rate of 0.29%. Urban telephone subscription declined from 680.80 million at the end of Aug-19 to 677.95 million at the end of Sep-19; however the rural subscription increased from 511.02 million to 517.29 million during the same period. India has filed an appeal against the World Trade Organisation (WTO) panel report, which ruled that many of its popular export promotion incentives were not in sync with multilateral trade rules and needed to be withdrawn. India filed an appeal concerning the WTO panel report in the case brought by the United States in "India – Export Related Measures".

Equity Markets: Key equity barometers ended with decent gains on Wednesday. The Nifty ended just below the 12,000 level. The benchmark S&P BSE Sensex hit fresh record high of 40,816.38 in morning. BSE Sensex rose 181.94 points or 0.45% to 40,651.64. The Nifty 50 index rose 59 points or 0.49% to 11,999.10. In the broader market, the S&P BSE Mid-Cap index rose 0.25% while the S&P BSE Small-Cap index rose 0.07%.

Corporate News: The Cabinet Committee on Economic Affairs has accorded 'In-principle' approval for strategic disinvestment in select CPSEs including Bharat Petroleum Corporation (BPCL), Shipping Corporation of India (SCI), Container Corporation of India, Tehri Hydro Development Corporation India and North Eastern Electric Power Corporation. Strategic disinvestment of CPSEs will be undertaken through already established procedure and mechanism. Telecom stocks will be in focus after the Union Cabinet has approved the proposal for Mitigating financial stress being faced by the Telecom Services Sector. Department of Telecommunication will give an option to the Telecom Service Providers (TSPs) to defer payment of the spectrum auction instalments due for 2020-21 & 2021-22, either for one or both years. The decision for deferring spectrum payment instalments for two years will be implemented within a fortnight.





FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(87.2)	118.7	31.1
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)	46,843	42,515	36,418
F&O(INR cr)	1,282,512	1,312,754	1,344,272

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.3	16.0
NSE VIX	15.2	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	31,354	0.4 %	3.4 %	Energy	16,337	1.4 %	(1.2) %
IT	15,319	0.1 %	(3.3) %	Pharma	8,108	3.3 %	(13.5) %
Metals	2,525	0.3 %	(18.6) %	Finance	13,982	(0.2) %	11.9 %
Auto	8,084	0.2 %	(3.9) %	PSU	2,572	(0.7) %	(24.0) %
FMCG	31,089	0.4 %	3.0 %	Real Estate	274	(1.5) %	2.5 %

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	7	16.5 %	(60.3) %	Bharti Inf	241	(3.9) %	(23.3) %
Zee Entert	307	7.4 %	(28.9) %	New India	148	(3.7) %	(21.6) %
Sun Pharma	450	5.7 %	(6.0) %	General In	247	(3.6) %	0.3 %
IndusInd B	1,469	5.5 %	(15.7) %	Siemens	1,543	(2.3) %	36.4 %
B P C L	545	4.9 %	39.0 %	Indiabulls	208	(2.1) %	(75.4) %

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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