



22 Nov.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|----------|
| CNX NIFTY | 11,955 | (0.1) % | 2.4 % |
| BSE SENSEX | 40,575 | (0.2) % | 4.3 % |
| CNX BANK | 31,304 | (0.1) % | 3.2 % |
| CNX MIDCAP | 16,853 | (0.1) % | (8.1) % |
| CNX SMALLCAP | 5,719 | 0.2 % | (15.1) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 27,766 | (0.2) % | 19.0 % |
| S&P 500 | 3,104 | (0.2) % | 23.8 % |
| FTSE 100 | 7,239 | (0.3) % | 7.5 % |
| HANG SENG | 26,467 | (1.6) % | 5.3 % |
| NIKKEI | 23,039 | (0.5) % | 17.8 % |
| SHANGHAI COMPOSITE | 2,904 | (0.3) % | 17.8 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 71.56 | (0.1) % | 3.1 % |
| EUR/USD | 1.11 | (0.0) % | (3.3) % |
| GBP/USD | 1.29 | (0.1) % | 1.4 % |
| USD/JPY | 108.57 | (0.2) % | (1.0) % |
| USD/AUD | 1.47 | 0.2 % | 3.6 % |
| USD/SGD | 1.36 | 0.1 % | (0.2) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 57 | 3.8 % | 22.7 % |
| Gold(INR/10g) | 38,096 | (0.5) % | 20.8 % |
| Gold Comex(USD/oz) | 1,464 | (0.7) % | 13.4 % |
| SILVER(INR/1Kg) | 44,682 | (0.6) % | 16.8 % |
| Aluminium(USD/MT) | 1,753 | 0.3 % | (5.7) % |
| Copper(USD/MT) | 5,813 | (1.0) % | (0.4) % |

FIXED INCOME

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

Global Economy: Trade conflict, weak business investment and persistent political uncertainty are weighing on the world economy and raising the risk of long-term stagnation, according to the OECD's latest Economic Outlook. OECD stated that the world GDP growth is expected to be 2.9% this year - its lowest annual rate since the financial crisis - and remain at 2.9%-3.0% in 2020 and 2021. Global GDP expanded 3.5% in 2018. Bold action is needed to address both the high levels of uncertainty facing businesses as well as the fundamental changes taking place in the global economy, according to the OECD. Global slowdown involves advanced and emerging-market economies alike although its severity varies according to the importance of trade in individual countries. Growth in the US is forecast to slow to 2% in 2020 and 2021. In the euro area and Japan, growth is expected at around 1% while the deceleration in China's expansion is set to reach 5.5% in 2021, compared with 6.6% last year. UK public sector net borrowing excluding public sector banks, increased by GBP 2.3 billion from the last year to GBP 11.2 billion in October, data from the Office for National Statistics showed Thursday. Japan's all industry activity rose 1.5% month-on-month in September, after remaining unchanged in August, figures from the Ministry of Economy, Trade and Industry showed. On a yearly basis, the all industry activity index gained 2.9% in September, in contrast to a 0.6% fall in the prior month. Singapore Gross domestic product grew 0.5% on a year-on-year basis in the third quarter, slightly higher than the 0.2% growth in the previous quarter and the advance estimate of 0.1%, the Ministry of Trade and Industry said Thursday. On a quarter-on-quarter seasonally-adjusted annualized basis, the economy expanded 2.1%, a turnaround from the 2.7% contraction in the preceding quarter.

Global Equities: DOW slipped for third session. US leading economic index edged down by 0.1% in October after dipping by 0.2% in both September and August.

Indian Economy: The Union Cabinet chaired by Prime Minister Narendra Modi 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 installments due for 2020-21 & 2021-22, either for one or both years. These deferred amounts will be spread equally in the remaining instalments to be paid by TSPs. Interest as stipulated while auctioning of the concerned spectrum will however be charged so that NPV is protected.

Equity Markets: The local market snapped its two-day winning run and ended with modest losses on Thursday. Investors booked profits after the Union Cabinet announced several measures on Wednesday. Negative global cues also dented trading sentiment. Trading was volatile due to weekly expiry of index options. The barometer index, the BSE Sensex, fell 76.47 points or 0.19% to 40,575.17. The Nifty 50 index fell 30.70 points or 0.26% to 11,968.40.

Corporate News: Shares of RITES will be in focus. The President of India, acting through and represented by the Ministry of Railways, Government of India, (Promoter) of RITES proposes to sell up to 2.50 crore equity shares, in aggregate representing 10% of the total equity share capital of the company on 22 November 2019 (for non-retail investors only) and on 25 November 2019 (for retail investors and for non-retail investors who choose to carry forward their un-allotted bids), with an option to additionally sell up to 1.25 crore equity shares (representing 5% of the total share capital of the company) through offer-for-sale (OFS). The floor price for the OFS is Rs 293.50 per share. Bajaj Holdings & Investment clarified that as an investment company, the company manages a large investment portfolio and evaluate many companies on a regular basis. No decision has been taken on any investment in RBL.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 59.7 | 114.2 | 31.3 |
| 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) | 45,016 | 42,693 | 36,473 |
| F&O(INR cr) | 2,361,815 | 1,387,687 | 1,350,794 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0 | 18.1 | 16.0 |
| NSE VIX | 15.0 | 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 | 31,350 | (0.0) % | 3.4 % | Energy | 16,085 | (1.5) % | (2.7) % |
| IT | 15,294 | (0.2) % | (3.5) % | Pharma | 8,069 | (0.5) % | (13.9) % |
| Metals | 2,470 | (2.2) % | (20.4) % | Finance | 14,019 | 0.3 % | 12.2 % |
| Auto | 8,005 | (1.0) % | (4.9) % | PSU | 2,565 | (0.3) % | (24.2) % |
| FMCG | 30,894 | (0.6) % | 2.3 % | Real Estate | 275 | 0.5 % | 3.1 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Zee Entert | 345 | 12.4 % | (20.0) % | Motherson | 122 | (7.6) % | (20.4) % |
| Indiabulls | 232 | 11.2 % | (72.7) % | Vodafone I | 7 | (5.7) % | (62.5) % |
| General In | 269 | 8.9 % | 9.3 % | B P C L | 514 | (5.6) % | 31.2 % |
| Bosch | 15,783 | 4.8 % | (12.8) % | Page Indus | 22,180 | (3.8) % | (13.1) % |
| HDFC AMC | 3,770 | 4.0 % | 142.3 % | Tata Steel | 385 | (3.4) % | (28.0) % |

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 | | | | | |

..... End of Report