



23 Nov.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,342	0.1 %	12.0 %
BSE SENSEX	33,562	0.2 %	12.2 %
CNX BANK	25,767	0.0 %	19.6 %
CNX MIDCAP	19,826	(0.0) %	14.4 %
CNX SMALLCAP	8,538	0.5 %	20.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,526	(0.3) %	18.3 %
S&P 500	2,597	(0.1) %	15.0 %
FTSE 100	7,419	0.1 %	3.4 %
HANG SENG	30,003	0.6 %	35.5 %
NIKKEI	22,523	0.5 %	14.9 %
SHANGHAI COMPOSITE	3,430	0.6 %	9.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.92	(0.3) %	(3.7) %
EUR/USD	1.18	0.8 %	11.5 %
GBP/USD	1.33	0.7 %	8.4 %
USD/JPY	111.19	(1.3) %	(4.1) %
USD/AUD	1.31	(0.9) %	(3.9) %
USD/SGD	1.35	(0.8) %	(5.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.3 %	8.6 %
Gold(INR/10g)	29,429	(0.0) %	5.8 %
Gold Comex(USD/oz)	1,279	(0.0) %	10.5 %
SILVER(INR/1Kg)	39,271	(0.1) %	0.9 %
Aluminium(USD/MT)	2,062	(0.3) %	21.2 %
Copper(USD/MT)	6,828	1.1 %	22.5 %

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 US Federal Reserve noted that a rate hike is "likely" despite mounting concerns about low inflation. Low inflation might also be a result of "developments that could prove more persistent," according to the minutes of the Fed's most recent meeting on Oct 31-Nov 1. At that meeting, the Fed held interest rates steady between 1% and 1.25%. A number of officials are worried that a decline in longer-term inflation expectations would make it more challenging for the Committee to promote a return of inflation to 2 percent over the medium term. However, GDP is expected to rise at a solid pace in the fourth quarter of this year, boosted in part by a rebound in spending and production after the negative effects of the hurricanes in the third quarter. The University of Michigan US consumer sentiment index for November was upwardly revised to 98.5 from the preliminary estimate of 97.8.

Global Equities: Dow slipped a little yesterday while the tech-heavy Nasdaq edged up to a new record closing high. European stocks were mixed ahead of the ECB meeting.

Indian Economy: The effects of demonetization are still persisting as demand in the economy is still lacklustre and business firms are still not enthusiastic in production process said Anil Khaitan, President, PHD Chamber of Commerce and Industry in a press statement. Though demonetization of Rs.500 and Rs.1000 currency notes has completed one year today, the industries have still not recovered fully from the aftermath of unearthing 86% of the total currency. We appreciate the efforts of the government to stamp out black money from the system, restrict terror funding, curb corruption, integrate informal economy into formal economy and to move towards less cash society, said Khaitan.

Equity Markets: Local stocks edged up as firmness in most global stocks underpinned sentiment. Indices gained for the fifth day in a row. The market had opened higher on firm Asian stocks and amid record closing for US stocks. However, key indices soon pared gains and slipped into the red. Indices regained positive terrain in mid-morning trade and traded in a narrow range in positive zone later during the session.

Corporate News: The government will come out with an ordinance to make certain amendments to the Insolvency and Bankruptcy Code, Corporate Affairs Minister Arun Jaitley said on Wednesday. The Code, which became operational in December last year, provides for a market-determined and time-bound insolvency resolution process. It is implemented by the corporate affairs ministry. SBI has emerged as the most popular bank for online transactions, shows a study from Truecaller. The Delhi High Court refrained from granting an interim stay on the probe into an FIR against RIL for alleged irregularities in raising the price of gas from the KG-6 basin.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(37.8)	157.6	7.7
MF(INR cr)	2,325.9	478.2	596.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	7,320	38,037	31,869
F&O(INR cr)	664,657	652,963	604,878

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.7	10.7	11.0
NSE VIX	14.0	13.3	12.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,767	0.0 %	19.6 %	Energy	14,223	(0.1) %	20.3 %
IT	11,118	(0.0) %	5.0 %	Pharma	9,278	(0.7) %	(11.7) %
Metals	3,797	(0.7) %	22.3 %	Finance	10,518	0.3 %	19.2 %
Auto	11,355	0.3 %	14.4 %	PSU	4,045	1.3 %	14.7 %
FMCG	25,797	0.4 %	9.1 %	Real Estate	317	0.3 %	44.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	562	4.0 %	6.3 %	Idea Cellu	98	(2.4) %	15.7 %
Adani Port	415	3.4 %	21.2 %	Motherson	345	(2.3) %	37.7 %
United Spi	3,300	3.1 %	61.2 %	Tech Mahin	483	(2.3) %	6.5 %
Sun TV Net	875	3.0 %	10.0 %	Bajaj Fin.	1,774	(2.0) %	50.1 %
Avenue Sup	1,138	2.3 %	79.4 %	Bharti Inf	376	(1.9) %	14.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (SEP)	23-11-2017	13:30	CAD	-	(0.003)
Retail Sales Ex Auto (MoM) (SEP)	23-11-2017	13:30	CAD	-	(0.007)
SNB's Thomas Jordan Speaks in Basel	23-11-2017	16:30	CHF	-	-
ECB account of the monetary policy meeting	23-11-2017	12:30	EUR	-	-
ECB's Coeure Speaks at Conference in Paris	23-11-2017	18:15	EUR	-	-
German Capital Investment (3Q)	23-11-2017	7:00	EUR	-	0.01
German Construction Investment (3Q)	23-11-2017	7:00	EUR	-	0.009
German Domestic Demand (3Q)	23-11-2017	7:00	EUR	-	0.01
German Exports (3Q)	23-11-2017	7:00	EUR	-	0.007
German Government Spending (3Q)	23-11-2017	7:00	EUR	-	0.006
German Gross Domestic Product n.s.a. (YoY) (3Q F)	23-11-2017	7:00	EUR	-	0.023
German Gross Domestic Product s.a. (QoQ) (3Q F)	23-11-2017	7:00	EUR	-	0.008
German Gross Domestic Product w.d.a. (YoY) (3Q F)	23-11-2017	7:00	EUR	-	0.028
German Imports (3Q)	23-11-2017	7:00	EUR	-	0.017
German Private Consumption (3Q)	23-11-2017	7:00	EUR	-	0.008
Markit Eurozone Composite PMI (NOV P)	23-11-2017	9:00	EUR	-	56
Markit Eurozone Manufacturing PMI (NOV P)	23-11-2017	9:00	EUR	-	58.5
Markit Eurozone Services PMI (NOV P)	23-11-2017	9:00	EUR	-	55
Markit France Composite PMI (NOV P)	23-11-2017	8:00	EUR	-	57.4
Markit France Manufacturing PMI (NOV P)	23-11-2017	8:00	EUR	-	56.1
Markit France Services PMI (NOV P)	23-11-2017	8:00	EUR	-	57.3
Markit Germany Services PMI (NOV P)	23-11-2017	8:30	EUR	-	54.7
Markit/BME Germany Composite PMI (NOV P)	23-11-2017	8:30	EUR	-	56.6
Markit/BME Germany Manufacturing PMI (NOV P)	23-11-2017	8:30	EUR	-	60.6
CBI Reported Sales (NOV)	23-11-2017	11:00	GBP	-	(36)
CBI Total Dist. Reported Sales (NOV)	23-11-2017	11:00	GBP	-	1
Exports (3Q P)	23-11-2017	9:30	GBP	-	0.007
Government Spending (3Q P)	23-11-2017	9:30	GBP	-	0.006
Gross Domestic Product (QoQ) (3Q P)	23-11-2017	9:30	GBP	-	0.004



Gross Domestic Product (YoY) (3Q P)	23-11-2017	9:30	GBP	-	0.015
Gross Fixed Capital Formation (3Q P)	23-11-2017	9:30	GBP	-	0.007
Imports (3Q P)	23-11-2017	9:30	GBP	-	0.007
Index of Services (3Mo3M) (SEP)	23-11-2017	9:30	GBP	-	0.004
Index of Services (MoM) (SEP)	23-11-2017	9:30	GBP	-	0.002
Private Consumption (3Q P)	23-11-2017	9:30	GBP	-	0.001
Total Business Investment (QoQ) (3Q P)	23-11-2017	9:30	GBP	-	0.005
Total Business Investment (YoY) (3Q P)	23-11-2017	9:30	GBP	-	0.025
Foreign Buying Japan Bonds (NOV 17)	23-11-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (NOV 17)	23-11-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (NOV 17)	23-11-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (NOV 17)	23-11-2017	23:50	JPY	-	-
Exports (OCT)	23-11-2017	21:45	NZD	-	-
Imports (OCT)	23-11-2017	21:45	NZD	-	-
Trade Balance (OCT)	23-11-2017	21:45	NZD	-	-
Trade Balance 12 Mth YTD (OCT)	23-11-2017	21:45	NZD	-	-

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