



24 Nov.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,363	0.1 %	12.2 %
BSE SENSEX	33,588	0.1 %	12.4 %
CNX BANK	25,736	0.0 %	19.4 %
CNX MIDCAP	19,884	0.0 %	14.7 %
CNX SMALLCAP	8,611	0.0 %	21.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,526	(0.3) %	18.3 %
S&P 500	2,597	(0.1) %	15.0 %
FTSE 100	7,417	(0.0) %	3.3 %
HANG SENG	29,708	(1.0) %	34.1 %
NIKKEI	22,523	0.5 %	14.9 %
SHANGHAI COMPOSITE	3,352	(2.3) %	6.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.57	(0.5) %	(4.2) %
EUR/USD	1.18	0.9 %	11.8 %
GBP/USD	1.33	0.4 %	8.1 %
USD/JPY	111.30	(0.9) %	(4.0) %
USD/AUD	1.31	(0.6) %	(4.1) %
USD/SGD	1.35	(0.7) %	(5.9) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	2.1 %	10.9 %
Gold(INR/10g)	29,499	0.2 %	6.1 %
Gold Comex(USD/oz)	1,294	1.2 %	11.8 %
SILVER(INR/1Kg)	39,377	0.3 %	1.2 %
Aluminium(USD/MT)	2,085	1.1 %	22.5 %
Copper(USD/MT)	6,873	0.7 %	23.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	(0.0) %	(0.1) %

**Global Economy:** Growth in Eurozone private sector activity strengthened in November, flash survey data from IHS Markit showed Thursday. The headline composite output index increased to 57.5 in November from 56.0 in October. This was the highest score since April 2011. The reading was forecast to remain unchanged at 56.0. The factory Purchasing Managers' Index climbed to 60.0 in November from 58.5 a month ago. The expected level was 58.2. Similarly, the services PMI came in at 56.2 in November versus 55.0 in October. The UK economy grew at a faster rate in the third quarter, largely driven by private consumption, second estimate from the Office for National Statistics showed. Gross domestic product grew 0.4% sequentially, slightly faster than the 0.3% growth in the second quarter. On a yearly basis, GDP growth was steady at 1.5% in the third quarter and in line with preliminary estimate.

**Global Equities:** European stocks edged higher amid positive economic data. US markets were closed on Thanksgiving Day Holiday.

**Indian Economy:** India has the most developed financial markets, which can provide longer-tenor loans (above 10 years) in local currency to support infrastructure, noted the ADB in a latest report. Union Minister of Road Transport and Highways, Shipping, Water Resources, River Development and Ganga Rejuvenation Nitin Gadkari has said that the Centre has approved projects of value of more than one Lakh crore rupees for Tamil Nadu. These projects will cover the Highways, Shipping and Port and for finding a permanent solution to the irrigation and drinking water requirements of the state.

**Equity Markets:** Local indices closed with tiny gains after range bound trading session as the Government constituting a task force to review the Income-tax Act, 1961 and to draft a new Direct Tax Law in consonance with economic needs of the country supported gains on the bourses. Markets gained for the sixth straight day. Indices extended gains and hit intraday high in mid-morning trade. Later, indices trimmed gains and slipped into negative zone in afternoon trade.

**Corporate News:** Cox & Kings said that the company owned MEININGER Hotels and Peter Simmel signed an agreement for a hotel in Dresden in Germany. The 165 rooms and 639 beds hotel is scheduled to open in the second quarter of 2021. Camlin Fine Sciences said that its qualified institutional placement (QIP) committee at its meeting held on 23 November 2017 approved the allotment of 1.72 crore equity shares to eligible qualified institutional buyers (QIBs) at the issue price of Rs 87 per share, aggregating to Rs 149.99 crore. Skipper said its board gave in-principal approval to form a joint venture (JV) with MetzgerPlas Cooperative Agricultural Organization, which is one of the largest and most specialised manufacturers of drip irrigation solutions from Israel. The drip irrigation business holds immense potential in India and is one of the focus sectors of the government.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(37.6)	145.4	7.4
MF(INR cr)	2,325.9	478.2	596.8

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,074	37,804	31,883
F&O(INR cr)	1,134,036	681,262	608,164

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.9	10.6	11.0
NSE VIX	13.9	13.4	12.0

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,736	(0.1) %	19.4 %	Energy	14,341	0.8 %	21.3 %
IT	11,231	1.0 %	6.0 %	Pharma	9,293	0.2 %	(11.5) %
Metals	3,787	(0.3) %	21.9 %	Finance	10,485	(0.3) %	18.8 %
Auto	11,327	(0.2) %	14.2 %	PSU	4,030	(0.4) %	14.3 %
FMCG	25,786	(0.0) %	9.1 %	Real Estate	317	0.1 %	44.7 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
B H E L	93	4.7 %	(16.6) %	ICICI Pru	380	(3.9) %	(1.4) %
Bharat Ele	187	3.7 %	28.7 %	Idea Cellu	96	(2.4) %	12.9 %
Infosys	991	2.6 %	(1.7) %	Dr Reddy's	2,306	(2.3) %	(16.0) %
Sun Pharma	545	1.8 %	(21.3) %	Adani Port	407	(1.8) %	19.0 %
Reliance I	947	1.7 %	37.8 %	Container	1,337	(1.7) %	32.2 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Industrial Output w.d.a. (YoY) (3Q)	24-11-2017	8:15	CHF	-	0.029
Industry & Construction Output WDA (YoY) (3Q)	24-11-2017	8:15	CHF	-	0.034
ECB Vice-President Constancio speaks in Madrid	24-11-2017	12:30	EUR	-	-
ECB's Coeure speaks in Paris	24-11-2017	18:15	EUR	-	-
German IFO Business Climate (NOV)	24-11-2017	9:00	EUR	-	116.7
German IFO Current Assessment (NOV)	24-11-2017	9:00	EUR	-	124.8
German IFO Expectations (NOV)	24-11-2017	9:00	EUR	-	109.1
BBA Loans for House Purchase (OCT)	24-11-2017	9:30	GBP	-	41584
BOJ Outright Bond Purchase 10~25 Years	24-11-2017	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	24-11-2017	1:10	JPY	-	-
Coincident Index (SEP F)	24-11-2017	5:00	JPY	-	115.8
Leading Index CI (SEP F)	24-11-2017	5:00	JPY	-	106.6
Nikkei Japan PMI Manufacturing (NOV P)	24-11-2017	0:30	JPY	-	52.8
GDP NSA (YoY) (3Q F)	24-11-2017	14:00	MXN	-	0.016
GDP SA (QoQ) (3Q F)	24-11-2017	14:00	MXN	-	(0.002)
Markit US Composite PMI (NOV P)	24-11-2017	14:45	USD	-	55.2
Markit US Manufacturing PMI (NOV P)	24-11-2017	14:45	USD	-	54.6
Markit US Services PMI (NOV P)	24-11-2017	14:45	USD	-	55.3

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