MORNING EQUITIES UPDATE

25 Nov.2019

INDEX PERFORMANCE

INDIAN INDICES	*LATEST*	*% 1D*	*% YTD*
CNX NIFTY	11,914	(0.5) %	2.1 %
BSE SENSEX	40,359	(0.5) %	3.8 %
CNX BANK	31,112	(0.8) %	2.6 %
CNX MIDCAP	16,868	0.0 %	(8.0) %
CNX SMALLCAP	5,702	(0.1) %	(15.4) %

GLOBAL INDICES	*LATEST*	*% 1D*	*% YTD*
DOW JONES	27,876	0.4 %	19.5 %
S&P 500	3,110	0.2 %	24.1 %
FTSE 100	7,327	1.2 %	8.8 %
HANG SENG	26,595	0.5 %	5.8 %
NIKKEI	23,113	0.3 %	18.2 %
SHANGHAI COMPOSITE	2,885	(0.6) %	17.0 %

FOREX RATES

	LATEST	*% 1D*	*% YTD*
USD/INR	71.53	(0.0) %	3.0 %
EUR/USD	1.10	(0.2) %	(3.5) %
GBP/USD	1.29	(0.4) %	1.0 %
USD/JPY	108.62	0.1 %	(0.9) %
USD/AUD	1.47	0.1 %	3.7 %
USD/SGD	1.36	0.1 %	(0.1) %

COMMODITIES

	LATEST	*% 1D*	*% YTD*
WTI Crude(USD/bbl)	59	2.6 %	25.9 %
Gold(INR/10g)	38,157	0.2 %	21.0 %
Gold Comex(USD/oz)	1,462	(0.1) %	13.3 %
SILVER(INR/1Kg)	44,942	0.6 %	17.5 %
Aluminium(USD/MT)	1,750	(0.2) %	(5.8) %
Copper(USD/MT)	5,834	0.4 %	(0.1) %

FIXED INCOME

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

Global Economy: The University of Michigan consumer sentiment index for November was upwardly revised to 96.8 from the preliminary reading of 95.7. The revised reading is well above the final October reading of 95.5. The Conference Board said its leading economic index edged down by 0.1% in October after dipping by 0.2% in both September and August. Eurozone needs a new European policy mix that focuses on boosting public investment to create a sustainable future, and a review of the European Central Bank's monetary policy will start soon, the new ECB President Christine Lagarde said Friday. The Euro area private sector remained close to stagnant for a third consecutive month in November, flash data from IHS Markit showed. The composite output index fell to 50.3 in November from 50.6 in October. A score above 50 indicates expansion. The reading signaled the second slowest growth across manufacturing and services since the current upturn began in July 2013. The German economy avoided a technical recession in the third quarter, as initially estimated, latest data from Destatis showed Friday. Gross domestic product grew 0.1% sequentially, following second quarter's 0.2%contraction. This was in line with the estimate published on November 14th. On a yearly basis, unadjusted GDP advanced 1% in the third quarter, offsetting the 0.1% decline in the preceding period.

Global Equities: US stocks edged up after recent losses. DOW gained 0.40% on Friday.

Indian Economy: According to the latest rabi sowing data released by the Agriculture Ministry, the total area sown with winter crops remaining at 251 lakh hectares (lh), about 10% lower than the 276.83 lh planted in the corresponding week last year. The area under wheat has been sown on 96.77 lh, a little lower than the 99.64 lh of last year. The total area sown with oilseeds was 54.88 lh as against 58.07 lh last year. Decline was also seen in pulses front as pulses sowing is plunged by 19 per cent to 71.26 lh as on 22nd November.

Equity Markets: Local stocks ended with modest losses on Friday, dragged by weakness in IT shares. Mixed signals surrounding the US-China trade deal also spoiled sentiment. The barometer index, the BSE Sensex, fell 215.76 points or 0.53% to 40,359.41. The Nifty 50 index fell 54 points or 0.45% to 11,916.20.

Corporate News: Ashoka Buildcon on Saturday said its subsidiary Ashoka Concessions Ltd (ACL) has received a Letter of Award (LOA) from NHAI for a highway project in Telangana worth Rs 1,000 crore. Unichem Labs said that the company got US FDA approval for generic of Tenormin tablets. Tata Motors, Tata Motors DVR, Vedanta, Yes Bank to exit BSE Sensex from December 23. Titan, UltraTech Cement, Nestle India to be included in BSE Sensex from December 23.

FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	697.2	155.9	35.5
MF(INR cr)	(420.4)	(118.4)	333.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,966	42,312	36,476
F&O(INR cr)	766,847	1,346,297	1,347,075

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.0	18.0	16.0
NSE VIX	14.9	15.6	17.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,112	(0.8) %	2.6 %	Energy	16,221	0.8 %	(1.9) %
IT	14,996	(1.9) %	(5.3) %	Pharma	8,067	(0.0) %	(14.0) %
Metals	2,521	2.1 %	(18.7) %	Finance	13,952	(0.5) %	11.6 %
Auto	8,035	0.4 %	(4.5) %	PSU	2,560	(0.2) %	(24.4) %
FMCG	30,810	(0.3) %	2.0 %	Real Estate	276	0.1 %	3.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Motherson	127	4.0 %	(17.2) %	Bharti Inf	232	(4.1) %	(26.2) %
Tata Steel	400	3.9 %	(25.3) %	General In	258	(4.0) %	4.9 %
Zee Entert	358	3.8 %	(17.0) %	Siemens	1,490	(3.5) %	31.7 %
Eicher Mot	22,753	3.6 %	13.5 %	Container	558	(3.3) %	5.1 %
Bosch	16,337	3.5 %	(9.8) %	Petronet L	265	(2.9) %	7.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE

No Data Found

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