



26 Nov.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,527	(0.7) %	3.1 %
BSE SENSEX	34,981	(0.6) %	5.2 %
CNX BANK	25,999	(1.0) %	6.9 %
CNX MIDCAP	17,347	(0.9) %	(9.2) %
CNX SMALLCAP	6,204	(0.4) %	(21.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,286	(0.7) %	(2.2) %
S&P 500	2,633	(0.7) %	(2.3) %
FTSE 100	6,953	(0.1) %	(9.1) %
HANG SENG	25,928	(0.4) %	(15.0) %
NIKKEI	21,647	0.7 %	(7.9) %
SHANGHAI COMPOSITE	2,579	(2.5) %	(23.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.70	(1.1) %	11.0 %
EUR/USD	1.14	0.1 %	(5.0) %
GBP/USD	1.29	0.7 %	(4.7) %
USD/JPY	112.95	(0.0) %	0.2 %
USD/AUD	1.38	0.1 %	7.9 %
USD/SGD	1.37	(0.1) %	2.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	(7.5) %	(16.5) %
Gold(INR/10g)	30,834	(0.1) %	5.0 %
Gold Comex(USD/oz)	1,223	(0.4) %	(6.5) %
SILVER(INR/1Kg)	36,798	0.3 %	(4.7) %
Aluminium(USD/MT)	1,923	(1.0) %	(14.8) %
Copper(USD/MT)	6,210	(0.6) %	(13.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	(0.0) %	0.6 %

Global Economy: Eurozone private sector grew at the slowest pace in nearly four years in November, with slower expansions in both manufacturing and services, amid weaker demand and confidence, flash estimates from IHS Markit showed on Friday. The composite purchasing managers' index, or PMI, which combines manufacturing and services, dropped to 52.4 from 53.1 in October. Germany's economy shrunk for the first time since early 2015 and at the fastest pace in nearly six years, mainly due to weak exports and car sales, latest figures from the Federal Statistical Office showed. Gross domestic product declined a seasonally and calendar-adjusted 0.2% quarter-on-quarter in the three months to September.

Global Equities: US stocks stayed locked in a downward range and fell near four month low amid trade worries and continued slide in commodity prices.

Indian Economy: As per the latest release by Ministry of Agriculture, the total rabi sowing acreage as on 23rd November was reported at 288.91 (lh) lakh hectares against 311.69 lakh hectares in the previous year in same period due to less cultivation of coarse cereals and pulses. This stands for a decline of nearly 7.30%. The data suggested that the total area under pulses remained at 88.67 lh (99 lh). Gram, which is a major pulses crop during the season, has been sown only on 62.65 lh, down 13%. The acreage under coarse cereals stood at 24.19 lh, 31% lower. Jowar sowing is nearly 36% down to 15.97 lh so far. There is also a 19% drop in the cultivation of maize at 4.84 lh and 11% drop in barley sowing at 3.16 lh. The total wheat sown area for the week stood at was 111.96 lh against 110.69 lh of the last year in the same period.

Equity Markets: Indian equity markets settled with modest losses in the truncated trading week after posting gains for prior three weeks. The Sensex settled a tad below the psychological 35,000 level. Indices settled lower on three of four trading days in the week. In the week ended Thursday, 22 November 2018, the Sensex lost 476.14 points or 1.34% to settle at 34,981.02. The Nifty 50 index lost 155.45 points or 1.46% to settle at 10,526.75.

Corporate News: Local Oil Marketing Companies (OMCs) would be in focus today after a massive 8% tumble in crude oil prices on Friday took the commodity near its fresh 13 month low. BEML has been awarded the Letter of Acceptance from DMRC for supply of 378 metro coaches (63 metro trains) to Mumbai Metro Line - 2 & 7 project. Dwarikesh Sugar Industries has approved the expansion of its Distillery capacity at its Dwarikesh Nagar Plant, Bijnor to 100 Kilo Litres Per Day (KLPD). Lupin announced the launch of a chat bot named 'ANYA' specially designed to provide medically verified information for health-related queries. ANYA is the first bot of its kind to be launched in India for disease awareness. Oil India Ltd will buyback 5.04 crore of its shares for a little over Rs 1,085 crore as part of the government's push to cash-rich PSUs to part with their surplus either by paying higher dividends or through share buybacks so as to help meet revenue targets.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(679.6)	3.6	(50.2)
MF(INR cr)	65.0	6.2	473.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	26,730	29,816	34,944
F&O(INR cr)	1,638,348	946,357	969,321

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.5	19.7	15.4
NSE VIX	19.2	18.8	14.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,999	(1.0) %	6.9 %	Energy	13,979	(1.0) %	5.2 %
IT	13,836	(0.3) %	8.9 %	Pharma	9,302	(0.8) %	7.9 %
Metals	3,215	(1.8) %	(9.2) %	Finance	10,994	(0.8) %	7.1 %
Auto	9,063	(0.6) %	(18.0) %	PSU	2,920	(1.5) %	2.3 %
FMCG	29,244	(0.5) %	10.3 %	Real Estate	227	(1.3) %	(23.6) %

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	459	4.6 %	(20.7) %	Vodafone I	41	(7.0) %	(46.7) %
Motherson	156	3.5 %	(27.5) %	Sun TV Net	600	(3.4) %	(30.2) %
SBI Life I	573	2.2 %	(16.3) %	DLF	177	(3.1) %	(11.9) %
Adani Port	368	1.9 %	(0.4) %	M & M	746	(3.0) %	(0.3) %
Bosch	19,033	1.7 %	2.8 %	Bandhan Ba	454	(2.7) %	(4.6) %

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