



27 Nov.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,629	1.0 %	4.1 %
BSE SENSEX	35,354	1.1 %	6.3 %
CNX BANK	26,366	1.4 %	8.4 %
CNX MIDCAP	17,381	0.2 %	(9.0) %
CNX SMALLCAP	6,190	(0.2) %	(21.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,640	1.5 %	(0.7) %
S&P 500	2,673	1.6 %	(0.8) %
FTSE 100	7,036	1.2 %	(8.0) %
HANG SENG	26,376	1.7 %	(13.6) %
NIKKEI	21,812	0.8 %	(7.2) %
SHANGHAI COMPOSITE	2,576	(0.1) %	(23.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.87	(0.8) %	11.3 %
EUR/USD	1.13	(0.6) %	(5.7) %
GBP/USD	1.28	0.3 %	(5.1) %
USD/JPY	113.44	0.4 %	0.6 %
USD/AUD	1.39	0.5 %	8.4 %
USD/SGD	1.37	0.1 %	3.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	(7.5) %	(16.5) %
Gold(INR/10g)	30,705	(0.4) %	4.6 %
Gold Comex(USD/oz)	1,223	(0.4) %	(6.5) %
SILVER(INR/1Kg)	36,404	(1.1) %	(5.7) %
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: Germany's Ifo business confidence dropped more-than-expected in November, the Munich-based institute reported. The Ifo business confidence indicator fell to 102 from 102.9 in October, which was revised from 102.8. The expectations index of the survey dropped to 98.7 from 99.7, which was revised from 99.8. The current conditions index eased to 105.4 from 106.1, revised from 105.9. The manufacturing sector in Japan continued to expand in November, albeit at a slower pace, the latest survey from Nikkei showed on Monday with a preliminary manufacturing PMI score of 51.8. That's down from the six-month high score of 52.9 in October, although it remains in the expansion territory. Mortgage approvals for house purchase in the UK rose in October to its highest level in five months, figures from the UK Finance showed. The number of mortgage approvals for house purchase jumped to 45,289 from 37,348 in September.

Global Equities: Investors braced for a crucial meeting between US and Chinese leaders at the end of week. Markets were supported by recent developments in European politics, after the UK and European Union both announced progress in outlining their future relationship after Britain exits the EU.

Indian Economy: India recorded a marginal growth in its crude steel output at 8.77 million tonne (MT) during October 2018, according to World Steel Association (worldsteel). The country had produced 8.73 MT crude steel during the same month a year ago, the global industry body said in its latest report. The insolvency law has helped in directly and indirectly addressing stressed assets worth Rs 3 lakh crore in the last two years, a senior government official stated, according to media reports. More than 9,000 cases have come for redressal under the Insolvency and Bankruptcy Code (IBC), which became fully operational in December 2016. There has been a direct and indirect impact of the code on stressed assets worth close to Rs 3 lakh crore.

Equity Markets: Local stocks witnessed excellent gains after a breakout above 35000 levels for the S&P BSE Sensex triggered robust buying. Domestic stocks snapped three-day losses to score strong gains on positive global stocks. A sharp decline in crude oil prices also boosted gains. The massive rally was led by HDFC Bank, Hindustan Unilever and ITC. A sharp tumble in global crude oil prices is auguring well for the domestic sentiments.

Corporate News: Domestic IT stocks could be under pressure following the latest gains in Indian Rupee. The INR rose for the eighth straight day, approaching 70.30 against the US dollar as global Brent crude prices slipped below the \$60 per barrel mark. Future Retail announced that CARE has reaffirmed the credit rating of CARE A+ to commercial paper of the company. The Board of HEG approved a proposal to buyback upto 13,63,636 Equity Shares of the Company, being 3.41% of the total paid up equity share capital for an aggregate amount not exceeding Rs.750 crore at Rs 5500 per equity share.



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)	31,874	29,945	34,925
F&O(INR cr)	776,197	935,013	968,122

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.5	19.7	15.4
NSE VIX	20.4	18.9	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	26,366	1.4 %	8.4 %	Energy	14,004	0.2 %	5.4 %
IT	14,025	1.4 %	10.4 %	Pharma	9,181	(1.3) %	6.5 %
Metals	3,172	(1.3) %	(10.4) %	Finance	11,124	1.2 %	8.4 %
Auto	9,159	1.1 %	(17.2) %	PSU	2,944	0.8 %	3.1 %
FMCG	29,936	2.4 %	13.0 %	Real Estate	227	0.4 %	(23.3) %

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>
Hero Motoc	3,076	5.4 %	(15.6) %	S A I L	58	(4.0) %	(20.5) %
Dabur Indi	419	4.6 %	24.8 %	Shriram Tr	1,109	(4.0) %	(24.4) %
Colgate-Pa	1,199	4.4 %	13.5 %	Yes Bank	188	(3.9) %	(38.6) %
Hind. Unil	1,744	4.1 %	29.1 %	Vodafone I	40	(3.9) %	(48.8) %
Godrej Con	747	4.1 %	0.4 %	Aditya Bir	109	(3.8) %	(28.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Industrial Profits (YoY) (OCT)	27-11-2018	1:30	CNY	-	0.041
CBI Reported Sales (NOV)	27-11-2018	11:00	GBP	-	5
CBI Total Dist. Reported Sales (NOV)	27-11-2018	11:00	GBP	-	17
RBNZ Publishes Financial Stability Report	27-11-2018	20:00	NZD	-	-
Fed Vice Chairman Clarida Speaks in New York	27-11-2018	13:30	USD	-	-
House Price Index (MoM) (SEP)	27-11-2018	14:00	USD	-	0.003
House Price Purchase Index (QoQ) (3Q)	27-11-2018	14:00	USD	-	0.011
S&P CoreLogic CS 20-City (MoM) SA (SEP)	27-11-2018	14:00	USD	-	0.0009
S&P/Case-Shiller 20-City Index n.s.a (SEP)	27-11-2018	14:00	USD	-	213.72
S&P/Case-Shiller Composite-20 (YoY) (SEP)	27-11-2018	14:00	USD	-	0.0549
S&P/Case-Shiller US Home Price Index (SEP)	27-11-2018	14:00	USD	-	205.81
S&P/Case-Shiller US Home Price Index (YoY) (SEP)	27-11-2018	14:00	USD	-	0.0577
Conf. Board Expectations (NOV)	27-11-2018	15:00	USD	-	114.6
Conf. Board Present Situation (NOV)	27-11-2018	15:00	USD	-	172.8
Consumer Confidence Index (NOV)	27-11-2018	15:00	USD	-	137.9
U.S. to Sell 4-Week Bills	27-11-2018	16:30	USD	-	-
U.S. to Sell 8-Week Bills	27-11-2018	16:30	USD	-	-
U.S. to Sell USD40 Bln 5-Year Notes	27-11-2018	18:00	USD	-	-
Fed's Bostic, Evan and George Speak on Panel	27-11-2018	19:30	USD	-	-

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