



27 Nov.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,107	0.6 %	3.8 %
BSE SENSEX	40,821	(0.2) %	5.5 %
CNX BANK	31,872	0.5 %	5.1 %
CNX MIDCAP	17,006	0.5 %	(7.2) %
CNX SMALLCAP	5,743	0.4 %	(14.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,122	0.2 %	20.6 %
S&P 500	3,141	0.2 %	25.3 %
FTSE 100	7,403	0.1 %	9.9 %
HANG SENG	26,914	(0.3) %	7.1 %
NIKKEI	23,373	0.4 %	19.5 %
SHANGHAI COMPOSITE	2,907	0.0 %	17.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.33	(0.3) %	2.7 %
EUR/USD	1.10	(0.3) %	(3.8) %
GBP/USD	1.29	(0.0) %	1.0 %
USD/JPY	109.02	0.4 %	(0.6) %
USD/AUD	1.47	0.1 %	3.8 %
USD/SGD	1.37	0.1 %	0.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	1.1 %	25.5 %
Gold(INR/10g)	37,799	(0.2) %	19.9 %
Gold Comex(USD/oz)	1,459	0.4 %	13.1 %
SILVER(INR/1Kg)	44,181	(0.0) %	15.5 %
Aluminium(USD/MT)	1,751	(0.1) %	(5.8) %
Copper(USD/MT)	5,856	(0.3) %	0.3 %

**FIXED INCOME**

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

**Global Economy:** The US Conference Board said its consumer confidence index fell to 125.5 in November from an upwardly revised 126.1 in October. German consumer confidence is set to improve in December, survey data from market research group GfK showed Tuesday. The forward-looking consumer sentiment index rose to 9.7 points from 9.6 in November. Both economic and income expectations showed a marked increase, while propensity to buy remained at a high level despite marginal losses. The economic expectations index climbed sharply by 15.5 points to 1.7 in November. The income expectations indicator advanced 6.5 points to 45.5. Japan producer prices climbed 2.1% on year in October, the Bank of Japan said on Tuesday following the 0.5% gain in September. On a monthly basis, producer prices advanced 1.9% following the flat reading in the previous month. Individually, prices were higher for utilities, information and communications, transportation, real estate, rental and financial services. Reserve Bank of Australia Governor Philip Lowe said on Tuesday that quantitative easing becomes an option for the central bank with a cash rate of 0.25%. Singapore's industrial production increased unexpectedly in October, data from the Economic Development Board showed on Tuesday. Industrial production grew 4% year-on-year in October, following a 0.7% rise in September.

**Global Equities:** China's commerce ministry said Vice premier Liu He, China's chief trade negotiator, held a call with his US counterparts on core issues and that both sides agreed to keep in touch over remaining issues for a 'phase one' trade deal.

**Indian Economy:** Domestic Crude oil production during October, 2019 was 2738.44 TMT which is 7.21% lower than target and 5.09% lower when compared with October 2018. Cumulative crude oil production during April-October, 2019 was 19110.46 TMT which is 4.91% and 5.83% lower than target for the period and production during corresponding period of last year respectively. The yearly SBI Composite Index for November 2019 has improved marginally to cross the 50-benchmark and is at 50.8(Low Growth) compared to 49.80 (Low Decline) in October 2019. The monthly SBI Composite index continued to decline from Sep'19 and is at 49.96 (Low Decline) in November 2019 compared to 50.83 (Low Growth) in October 2019.

**Equity Markets:** After hitting a record high in morning trade, key equity benchmarks ended with minor losses on Tuesday. Selling emerged in late trade after Maharashtra chief minister Devendra Fadnavis announced resignation after his deputy Ajit Pawar quit. The barometer index, the BSE Sensex, fell 67.93 points or 0.17% to 40,821.30. The Nifty 50 index fell 36.05 points or 0.30% to 12,037.70. The Sensex hit an all-time of 41,120.28 while the Nifty hit an all-time high of 12,132.45 in morning trade.

**Corporate News:** IT counters could see some selling pressure on rising Indian Rupee. INR ended at 71.50 against the US dollar, rising 24 paise on the day after advancing near two week high of 71.50 per US dollar in intraday moves. HCL Technologies said that the record date for determining the entitlement of the equity shareholders of the company for the bonus shares has been fixed for 7 December 2019. On 23 October 2019, the board of directors had considered, approved and recommended issue of one bonus share for every one equity share held by the equity shareholders of the company. L&T Finance Holdings announced that the Committee of Directors of the company will approve raising of funds through proposed issue aggregating up to Rs. 60 crore and determine the issue price for the proposed issue on 29 November 2019.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	277.3	159.0	37.3
MF(INR cr)	(135.5)	(135.5)	329.4

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	85,335	44,619	36,797
F&O(INR cr)	1,391,010	1,334,297	1,345,782

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.0	16.0
NSE VIX	14.8	15.5	17.1

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,718	0.5 %	4.6 %	Energy	16,176	(0.6) %	(2.2) %
IT	14,922	(1.2) %	(5.8) %	Pharma	8,178	(0.4) %	(12.8) %
Metals	2,581	(0.8) %	(16.8) %	Finance	14,207	0.4 %	13.7 %
Auto	8,100	(0.9) %	(3.7) %	PSU	2,580	(0.8) %	(23.8) %
FMCG	31,055	(0.1) %	2.9 %	Real Estate	278	(0.9) %	4.1 %

## 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>
ICICI Bank	511	2.6 %	28.2 %	Vodafone I	6	(12.4) %	(66.2) %
GAIL (Indi	125	2.4 %	(29.5) %	Zee Entert	320	(7.0) %	(25.9) %
Motherson	134	2.3 %	(12.9) %	Bharti Inf	233	(7.0) %	(26.0) %
P & G Hygi	11,293	2.3 %	4.6 %	Piramal En	1,762	(4.6) %	(34.6) %
Shree Ceme	21,040	2.2 %	11.9 %	Bharti Air	432	(4.2) %	38.2 %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Construction Work Done (3Q)	27-11-2019	6:00	AUD	-	(0.038)
Credit Suisse Survey Expectations (NOV)	27-11-2019	14:30	CHF	-	(30.5)
Industrial Profits (YoY) (OCT)	27-11-2019	7:00	CNY	-	(0.053)
German Import Price Index (MoM) (OCT)	27-11-2019	12:30	EUR	-	0.006
ECB's Lane Speaks in Luxembourg	27-11-2019	15:00	EUR	-	-
BRC Shop Price Index (YoY) (NOV)	27-11-2019	5:31	GBP	-	(0.004)
BOJ Outright Bond Purchase 5~10 Years	27-11-2019	6:40	JPY	-	-
RBNZ Publishes Financial Stability Report	27-11-2019	1:30	NZD	-	-
Trade Balance (OCT)	27-11-2019	3:15	NZD	-	-
RBNZ Governor News Conference on FSR	27-11-2019	3:30	NZD	-	-
MBA Mortgage Applications (NOV 22)	27-11-2019	17:30	USD	-	(0.022)
Durable Goods Orders (OCT P)	27-11-2019	19:00	USD	-	(0.012)
Chicago Purchasing Manager (NOV)	27-11-2019	20:15	USD	-	43.2
PCE Core (YoY) (OCT)	27-11-2019	20:30	USD	-	0.017
DOE U.S. Crude Oil Inventories (NOV 22)	27-11-2019	21:00	USD	-	-
U.S. to Sell 7-Year Notes	27-11-2019	22:00	USD	-	-
EIA Natural Gas Storage Change (NOV 22)	27-11-2019	22:30	USD	-	(94)
Baker Hughes U.S. Rig Count (NOV 29)	27-11-2019	23:30	USD	-	803

..... End of Report .....