



28 Nov.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,400	0.1 %	12.6 %
BSE SENSEX	33,724	0.1 %	12.8 %
CNX BANK	25,892	0.4 %	20.2 %
CNX MIDCAP	20,085	0.5 %	15.9 %
CNX SMALLCAP	8,696	0.6 %	23.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,581	0.1 %	18.6 %
S&P 500	2,601	(0.0) %	15.2 %
FTSE 100	7,384	(0.4) %	2.9 %
HANG SENG	29,686	(0.6) %	34.0 %
NIKKEI	22,496	(0.2) %	14.8 %
SHANGHAI COMPOSITE	3,322	(0.9) %	5.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.50	(0.1) %	(4.3) %
EUR/USD	1.19	0.4 %	12.2 %
GBP/USD	1.33	0.2 %	8.3 %
USD/JPY	111.31	0.0 %	(4.0) %
USD/AUD	1.32	0.3 %	(3.9) %
USD/SGD	1.35	0.2 %	(5.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	1.6 %	12.7 %
Gold(INR/10g)	29,469	0.1 %	6.0 %
Gold Comex(USD/oz)	1,293	(0.3) %	11.7 %
SILVER(INR/1Kg)	39,311	(0.1) %	1.0 %
Aluminium(USD/MT)	2,104	0.7 %	23.6 %
Copper(USD/MT)	6,968	1.0 %	25.0 %

**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:** The Commerce Department has released a report showing an unexpected jump in new home sales in the US. The report released by the Commerce Department on Monday showed new home sales surged up by 6.2% to an annual rate of 685,000 in October. China's industrial profit growth remained strong in October despite easing slightly from a month earlier, figures from the National Bureau of Statistics showed Monday. Industrial profits rose 25.1% year-over-year in October, slower than the 27.7% surge in September, which was the sharpest growth since 2011. During the first ten months of the year, total profits of industrial enterprises grew 23.3% annually, up from 22.8% gain in the January to September period.

**Global Equities:** Equities turned in a mixed response as sentiments remained mostly steady following the Thanksgiving Holidays in US.

**Indian Economy:** As uncertainty and apprehension looms over crude oil prices and vegetables, mainly on the back of rising retail prices of onion and tomatoes, are disrupting the home makers' budget, inflation would remain a key concern both for the RBI and the government dimming any hope of a cut in interest rates, the ASSOCHAM said. However much over-leveraged India Inc may wish it, the macro indicators like inflation as also the inflationary expectations, point towards the opposite. So realistically speaking, we should keep our fingers crossed and hope that things do not become apt for taking interest upward, rather than downward. The RBI mandate as also the track record is that it has favoured hard stance against inflation rather than batting for growth, while the government's friendly advice for downward rates may not be available this time around, the ASSOCHAM note for its key Managing Committee members has pointed out.

**Equity Markets:** Stocks logged small gains on first trading day of the week after languishing in negative zone for most part of the trading session. Stocks logged gains for eight day in row. The Sensex and the Nifty, both, settled at their highest closing levels in three weeks. Domestic stocks edged lower in early trade on negative Asian stocks. Stocks hovered in negative zone in morning trade. Key benchmark indices gyrated in a small range amid negative bias in mid-morning trade.

**Corporate News:** Infosys announced a partnership with Hewlett Packard Enterprise (HPE) to offer a joint end-to-end mainframe modernization solution, which will provide global enterprise customers robust hardware and advanced software architecture. Reliance Communications (RCom) said it has entered into a binding share purchase agreement with Pantel Technologies and Veecon Media & Television for sale of its subsidiary Reliance BIG TV (RBTv), engaged in the business of direct-to-home (DTH) services across India. Tata Power Company announced that its wholly-owned subsidiary, Tata Power Solar Systems commissioned a rooftop project in India - a solar carport on the rooftop of the sprawling 70,000 square meter Unity One mall, a Unity Group endeavor in Rohini. The unique rooftop carport is estimated to set off 438 Tons of carbon emission annually. Bank of Baroda launched digital Supply Chain Finance solution which aims to accelerate working capital loan opportunities for the small and medium enterprises and large corporate clients. Adani's Carmichael coal mine project in Australia may not receive a 900 million dollar loan after the Labour party- led Queensland government said it will exercise its veto to not support the financial assistance.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	16.6	142.0	8.7
MF(INR cr)	2,325.9	478.2	596.8

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,171	37,219	31,887
F&O(INR cr)	571,836	661,168	606,719

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.7	10.5	11.0
NSE VIX	13.0	13.4	12.0

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,892	0.4 %	20.2 %	Energy	14,454	0.3 %	22.3 %
IT	11,314	0.1 %	6.8 %	Pharma	9,369	0.0 %	(10.8) %
Metals	3,740	(0.7) %	20.4 %	Finance	10,544	0.4 %	19.5 %
Auto	11,403	0.3 %	14.9 %	PSU	4,029	0.5 %	14.3 %
FMCG	25,907	(0.2) %	9.6 %	Real Estate	321	0.9 %	46.3 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Emami	1,324	4.5 %	26.2 %	JSW Steel	259	(2.4) %	37.1 %
Motherson	362	4.4 %	44.4 %	Godrej Con	950	(2.3) %	12.0 %
Ashok Leyl	124	4.3 %	47.0 %	Avenue Sup	1,130	(1.7) %	78.1 %
NTPC	186	3.4 %	13.2 %	H P C L	424	(1.5) %	22.5 %
Axis Bank	559	2.5 %	11.7 %	A B B	1,387	(1.5) %	5.0 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Bank of Canada Gov. Poloz, Sr. Dep. Gov Wilkins Press Conf.	28-11-2017	16:30	CAD	-	-
Bank of Canada Releases Financial System Review	28-11-2017	15:30	CAD	-	-
Industrial Product Price (MoM) (OCT)	28-11-2017	13:30	CAD	-	(0.003)
Raw Materials Price Index (MoM) (OCT)	28-11-2017	13:30	CAD	-	(0.001)
Euro-Zone M3 Money Supply (YoY) (OCT)	28-11-2017	9:00	EUR	-	0.051
German GfK Consumer Confidence (DEC)	28-11-2017	12:00	EUR	-	10.7
OECD Economic Outlook	28-11-2017	10:00	EUR	-	-
Large Retailers' Sales (OCT)	28-11-2017	23:50	JPY	-	0.019
Retail Trade (YoY) (OCT)	28-11-2017	23:50	JPY	-	0.022
Retail Trade s.a. (MoM) (OCT)	28-11-2017	23:50	JPY	-	0.008
Unemployment Rate NSA (OCT)	28-11-2017	14:00	MXN	-	0.036
Unemployment Rate SA (OCT)	28-11-2017	14:00	MXN	-	0.033
Advance Goods Trade Balance (OCT)	28-11-2017	13:30	USD	-	-
Conf. Board Expectations (NOV)	28-11-2017	15:00	USD	-	109.1
Conf. Board Present Situation (NOV)	28-11-2017	15:00	USD	-	151.1
Consumer Confidence Index (NOV)	28-11-2017	15:00	USD	-	125.9
Fed's Dudley □Introductory Remarks Conf. on Treasury Market	28-11-2017	14:15	USD	-	-
Fed's Dudley Speaks on U.S. Economy: 10 Years After Crisis	28-11-2017	0:00	USD	-	-
Fed's Harker Speaks on □Financial Safety for Aging Population	28-11-2017	15:15	USD	-	-
House Price Index (MoM) (SEP)	28-11-2017	14:00	USD	-	0.007
House Price Purchase Index (QoQ) (3Q)	28-11-2017	14:00	USD	-	0.016
Powell Testifies at Confirmation Hearing Before Senate Banking	28-11-2017	14:45	USD	-	-
Retail Inventories (MoM) (OCT)	28-11-2017	13:30	USD	-	(0.01)
Richmond Fed Manufact. Index (NOV)	28-11-2017	15:00	USD	-	12
S&P CoreLogic CS 20-City (MoM) SA (SEP)	28-11-2017	14:00	USD	-	0.0045
S&P/Case-Shiller Composite-20 (YoY) (SEP)	28-11-2017	14:00	USD	-	0.0592
S&P/Case-Shiller Home Price Index (YoY) (SEP)	28-11-2017	14:00	USD	-	202.87
S&P/Case-Shiller US Home Price Index (SEP)	28-11-2017	14:00	USD	-	195.05
S&P/Case-Shiller US Home Price Index (YoY) (SEP)	28-11-2017	14:00	USD	-	0.0007



U.S. to Sell 4-Week Bills	28-11-2017	16:30	USD	-	-
U.S. to Sell USD28 Bln 7-Year Notes	28-11-2017	18:00	USD	-	-
Wholesale Inventories (MoM) (OCT P)	28-11-2017	13:30	USD	-	0.003

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