



28 Nov.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,721	0.3 %	5.0 %
BSE SENSEX	35,513	0.4 %	7.3 %
CNX BANK	26,509	0.2 %	9.0 %
CNX MIDCAP	17,470	0.0 %	(8.5) %
CNX SMALLCAP	6,222	(0.0) %	(21.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,749	0.4 %	(0.3) %
S&P 500	2,682	0.3 %	(0.5) %
FTSE 100	7,017	(0.3) %	(8.3) %
HANG SENG	26,332	(0.2) %	(13.7) %
NIKKEI	21,952	0.6 %	(6.6) %
SHANGHAI COMPOSITE	2,575	(0.0) %	(23.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.79	0.1 %	11.2 %
EUR/USD	1.13	(1.1) %	(6.0) %
GBP/USD	1.27	(1.1) %	(5.7) %
USD/JPY	113.77	0.7 %	0.9 %
USD/AUD	1.38	0.3 %	8.2 %
USD/SGD	1.38	0.4 %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	2.4 %	(14.5) %
Gold(INR/10g)	30,673	(0.1) %	4.5 %
Gold Comex(USD/oz)	1,228	0.4 %	(6.2) %
SILVER(INR/1Kg)	36,146	(0.7) %	(6.4) %
Aluminium(USD/MT)	1,920	(0.1) %	(14.9) %
Copper(USD/MT)	6,246	0.6 %	(13.0) %

FIXED INCOME

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

Global Economy: Rising protectionism's impact on financial markets has been "contained", European Central Bank researchers said in a paper published Tuesday. The total market impact of tariff-related news appears to have remained relatively contained so far and balanced across areas in stock and bond markets, the economists said, although firms and sectors directly affected have suffered much worse. Japan producer prices were up 1.3% on year in October, the Bank of Japan said on Tuesday. That was up from the downwardly revised 1.1% gain in September. On a monthly basis, producer prices climbed 0.4% following the flat reading in the previous month. Italy's consumer confidence deteriorated further in November to its lowest level in six months and the business morale was the weakest in nearly two years, figures from the statistical office ISTAT showed on Tuesday. The consumer confidence index dropped to 114.8 from 116.5 in October.

Global Equities: European shares were mixed as talk surrounding the UK's departure from the European Union continues to weigh on the market mood.

Indian Economy: India's Gross Domestic Product (GDP) growth in the September quarter is expected to ease to 7.5-7.6% mainly due to slowdown in rural demand, a State Bank of India (SBI) research report said. The GDP growth at constant prices (2011-12) was 8.2% in the April-June quarter of 2018-19. The 'SBI Ecowrap' report said the SBI Composite Leading Indicator (CLI), a basket of 21 leading indicators for September quarter of the current fiscal, is showing a marginal declining trend. Consequently, the headline second quarter Gross Value Added (GVA) growth could be 7.3-7.4%, due to the slowing of rural demand, it said. From next fiscal year, large corporates have to raise 25% of their incremental borrowings only through the corporate bonds market, Securities Exchange Board Of India (SEBI) stated in a latest circular.

Equity Markets: Domestic stocks ended with modest gains backed by firmness in index pivots. The barometer index, the S&P BSE Sensex, rose 159.06 points or 0.45% to settle at 35,513.14. The Nifty 50 index rose 57 points or 0.54% to settle at 10,685.60. Investors were cautious ahead of the expiry of futures and options (F&O) contracts on Thursday and the release of India's gross domestic product data for the September quarter on Friday. State assembly elections are also being closely watched.

Corporate News: Maruti Suzuki India (MSI) Tuesday said its premium hatchback Swift has crossed 20 lakh sales milestone since its launch the country in May 2005. The model raced past five lakh sales mark in September 2010, 10 lakh sales mark in September 2013, 15 lakh mark in March 2016 and 20 lakh milestone in November this year. Hinduja Group flagship company Ashok Leyland said it has set up a new 3S facility IFAD Autos in Dhaka, Bangladesh. The sales, service and spares facility, spread across 1.38 lakh square feet, is located at Madanpur, Narayanganj district on the Dhaka Chittagong highway. Global rating agency Moody's Investors Service has downgraded Yes Bank's foreign currency issuer rating to Ba1 from Baa3, citing leadership transition and governance issues as credit negative.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	181.7	33.1	(46.9)
MF(INR cr)	674.4	111.7	472.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,166	30,134	34,914
F&O(INR cr)	999,825	939,064	968,317

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.9	19.6	15.4
NSE VIX	18.3	18.9	14.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,443	0.3 %	8.7 %	Energy	14,186	1.3 %	6.7 %
IT	14,225	1.4 %	11.9 %	Pharma	9,058	(1.3) %	5.1 %
Metals	3,149	(0.7) %	(11.0) %	Finance	11,173	0.4 %	8.9 %
Auto	9,165	0.1 %	(17.1) %	PSU	2,974	1.0 %	4.2 %
FMCG	29,913	(0.1) %	12.9 %	Real Estate	228	0.1 %	(23.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Colgate-Pa	1,239	3.3 %	17.2 %	Piramal En	2,048	(6.0) %	(17.1) %
Motherson	162	3.1 %	(25.0) %	Hero Motoc	2,958	(3.8) %	(18.9) %
Infosys	639	2.8 %	12.4 %	Sun Pharma	494	(3.3) %	(2.8) %
Bandhan Ba	465	2.5 %	(2.3) %	Bharat Ele	93	(2.9) %	(35.6) %
B P C L	336	2.5 %	(20.8) %	Yes Bank	183	(2.8) %	(40.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Construction Work Done (3Q)	28-11-2018	0:30	AUD	-	0.016
Credit Suisse Survey Expectations (NOV)	28-11-2018	9:00	CHF	-	(39.1)
German GfK Consumer Confidence (DEC)	28-11-2018	12:00	EUR	-	10.6
Euro-Zone M3 Money Supply (YoY) (OCT)	28-11-2018	9:00	EUR	-	0.035
BRC Shop Price Index (YoY) (NOV)	28-11-2018	0:01	GBP	-	(0.002)
BOE Financial Stability Report and stress test results	28-11-2018	7:00	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	28-11-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	28-11-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (NOV 23)	28-11-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (NOV 23)	28-11-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (NOV 23)	28-11-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (NOV 23)	28-11-2018	23:50	JPY	-	-
Large Retailers' Sales (OCT)	28-11-2018	23:50	JPY	-	0.004
Retail Trade (YoY) (OCT)	28-11-2018	23:50	JPY	-	0.021
Retail Trade s.a. (MoM) (OCT)	28-11-2018	23:50	JPY	-	(0.002)
MBA Mortgage Applications (NOV 23)	28-11-2018	12:00	USD	-	(0.001)
Advance Goods Trade Balance (OCT)	28-11-2018	13:30	USD	-	-
Core PCE (QoQ) (3Q S)	28-11-2018	13:30	USD	-	0.016
Gross Domestic Product Annualized (QoQ) (3Q S)	28-11-2018	13:30	USD	-	0.035
Gross Domestic Product Price Index (3Q S)	28-11-2018	13:30	USD	-	0.017
Personal Consumption (3Q S)	28-11-2018	13:30	USD	-	0.04
Retail Inventories (MoM) (OCT)	28-11-2018	13:30	USD	-	0.001
Wholesale Inventories (MoM) (OCT P)	28-11-2018	13:30	USD	-	0.004
New Home Sales (MoM) (OCT)	28-11-2018	15:00	USD	-	(0.055)
New Home Sales (OCT)	28-11-2018	15:00	USD	-	-
Richmond Fed Manufact. Index (NOV)	28-11-2018	15:00	USD	-	15
DOE Cushing OK Crude Inventory (NOV 23)	28-11-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (NOV 23)	28-11-2018	15:30	USD	-	-
DOE U.S. Distillate Inventories (NOV 23)	28-11-2018	15:30	USD	-	-



DOE U.S. Gasoline Inventories (NOV 23)	28-11-2018	15:30	USD	-	-
U.S. to Sell USD18 Bln 2-Year Floating Rate Notes Reopening	28-11-2018	16:30	USD	-	-
Fed's Powell Speaks to Economic Club of New York	28-11-2018	17:00	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	28-11-2018	18:00	USD	-	-

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

