



29 Nov.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| CNX NIFTY | 10,797 | 0.6 % | 5.7 % |
| BSE SENSEX | 35,717 | 0.6 % | 8.3 % |
| CNX BANK | 26,608 | 0.6 % | 9.4 % |
| CNX MIDCAP | 17,354 | 0.3 % | (9.1) % |
| CNX SMALLCAP | 6,188 | 0.2 % | (22.0) % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 25,366 | 2.5 % | 2.2 % |
| S&P 500 | 2,744 | 2.3 % | 1.8 % |
| FTSE 100 | 7,005 | (0.2) % | (8.4) % |
| HANG SENG | 26,683 | 1.3 % | (12.6) % |
| NIKKEI | 22,177 | 1.0 % | (5.7) % |
| SHANGHAI COMPOSITE | 2,602 | 1.1 % | (22.3) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.62 | (0.4) % | 10.9 % |
| EUR/USD | 1.14 | 0.4 % | (5.3) % |
| GBP/USD | 1.28 | 0.1 % | (5.1) % |
| USD/JPY | 113.46 | 0.0 % | 0.7 % |
| USD/AUD | 1.37 | (1.2) % | 7.1 % |
| USD/SGD | 1.37 | (0.2) % | 2.8 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 60 | 16.6 % | (0.3) % |
| Gold(INR/10g) | 30,394 | (0.9) % | 3.5 % |
| Gold Comex(USD/oz) | 1,221 | (0.6) % | (6.7) % |
| SILVER(INR/1Kg) | 35,733 | (1.1) % | (7.4) % |
| Aluminium(USD/MT) | 1,925 | 0.3 % | (14.7) % |
| Copper(USD/MT) | 6,170 | (1.2) % | (14.1) % |

FIXED INCOME

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

Global Economy: Economic growth in the US was unrevised in the third quarter, according to the second reading released by the Commerce Department on Wednesday. The report said real gross domestic product jumped by 3.5% in the third quarter, unrevised from the initial estimate. German consumer confidence is set to slightly weaken at the end of the year as high inflation rates and global economic uncertainty weigh on households' sentiment, survey results from the GfK showed on Wednesday. The forward-looking consumer confidence indicator is set to drop to 10.4 from 10.6 in November, the Nuremberg-based GfK said in its latest report. Eurozone broad money M3 annual growth unexpectedly accelerated to a three-month high in October, while the increase in private sector credit was unchanged, figures from the European Central Bank showed. Monetary aggregate M3 grew 3.9% year-on-year after a 3.6% increase in September, revised from 3.5%.

Global Equities: DOW surged sharply after the Federal Reserve Chairman Jerome Powell described the current level of interest rates as just below neutral following a series of rate hikes this year. Market mood was well supported ahead of key policy meetings as investors eyed some comfort to emerge on the global trade talks.

Indian Economy: The Reserve Bank of India (RBI) is set to pump in further liquidity in December by infusing Rs 40,000 crore into the system through open market operations (OMOs). Based on an assessment of the durable liquidity needs going forward, the RBI has decided to conduct purchase of government securities under Open Market Operations (OMOs) for an aggregate amount of Rs 40,000 in the month of December 2018, the central bank said in a latest release. The cumulative number of houses sanctioned under PMAY (U) now is 65,04,037. The Ministry of Housing & Urban Affairs has approved the construction of another 2,05,442 more affordable houses for the benefit of urban poor under Pradhan Mantri Awas Yojana (Urban).

Equity Markets: Indian equity indices logged gains for third day in a row led by gains in index pivotals Infosys, TCS and Reliance Industries. IT stocks gained. Realty stocks declined. Positive global cues boosted investors sentiment. The barometer index, the S&P BSE Sensex, rose 203.81 points or 0.57% to settle at 35,716.95. The index hit high of 35,822.16 and low of 35,605.34 during the day. The Nifty 50 index rose 43.25 points or 0.40% to settle at 10,728.85. The index hit high of 10,757.80 and low of 10,699.85 during the day.

Corporate News: Tata Consultancy Services has acquired business of BridgePoint Group, LLC, a US management consulting firm catering to the financial services industry, and specializing in retirement services, through the purchase of select company assets. Sical Logistics has been awarded with a Letter of Acceptance on 27 November, 2018 by Mahanadi Coalfields for Extraction of coal / coal measure strata and allied transportation activities at Hingula OCP, Hingula Area for a contract price of Rs.363.38 crore [including GST] for extraction of 16.20 million Cu.M over a period of 3 years. State Bank of India (SBI) has hiked interest rates on fixed deposits (FD) by 5-10 basis points for select tenors. The revised rates will be applicable from November 28 for FDs of less than Rs 1 crore.



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|--------|-------|--------|
| FII(USD mm) | 95.4 | 37.2 | (46.0) |
| MF(INR cr) | 674.4 | 111.7 | 472.0 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 35,999 | 30,460 | 34,921 |
| F&O(INR cr) | 981,153 | 941,540 | 968,396 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 19.0 | 19.6 | 15.4 |
| NSE VIX | 18.0 | 18.8 | 14.8 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|---------|----------|-------------|--------|---------|----------|
| Banks | 26,458 | 0.1 % | 8.8 % | Energy | 14,265 | 0.6 % | 7.3 % |
| IT | 14,633 | 2.9 % | 15.2 % | Pharma | 9,015 | (0.5) % | 4.6 % |
| Metals | 3,117 | (1.0) % | (11.9) % | Finance | 11,223 | 0.4 % | 9.4 % |
| Auto | 9,096 | (0.7) % | (17.7) % | PSU | 2,915 | (2.0) % | 2.1 % |
| FMCG | 29,683 | (0.8) % | 12.0 % | Real Estate | 224 | (1.4) % | (24.3) % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|-------|----------|------------|--------|----------|----------|
| L&T Fin.Ho | 139 | 5.7 % | (13.4) % | Yes Bank | 162 | (11.3) % | (47.1) % |
| TCS | 1,984 | 5.0 % | 36.4 % | Bharat Ele | 89 | (4.8) % | (38.7) % |
| Infosys | 666 | 4.3 % | 17.2 % | B P C L | 320 | (4.6) % | (24.4) % |
| Zee Entert | 477 | 4.0 % | (17.5) % | Bharti Air | 314 | (4.3) % | (20.5) % |
| A B B | 1,399 | 3.2 % | 8.2 % | General In | 289 | (4.2) % | (21.7) % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--|------------|-----------|--------|--------|----------------|
| Private Capital Expenditure (3Q) | 29-11-2018 | 0:30 | AUD | - | (0.025) |
| CFIB Business Barometer (NOV) | 29-11-2018 | 11:00 | CAD | - | 60.5 |
| Current Account Balance (3Q) | 29-11-2018 | 13:30 | CAD | - | - |
| Gross Domestic Product (QoQ) (3Q) | 29-11-2018 | 6:45 | CHF | - | 0.007 |
| Gross Domestic Product (YoY) (3Q) | 29-11-2018 | 6:45 | CHF | - | 0.034 |
| Swift Global Payments CNY (OCT) | 29-11-2018 | 1:00 | CNY | - | 0.0189 |
| Euro-Zone Business Climate Indicator (NOV) | 29-11-2018 | 10:00 | EUR | - | 1.01 |
| Euro-Zone Consumer Confidence (NOV F) | 29-11-2018 | 10:00 | EUR | - | - |
| Euro-Zone Economic Confidence (NOV) | 29-11-2018 | 10:00 | EUR | - | 109.8 |
| Euro-Zone Industrial Confidence (NOV) | 29-11-2018 | 10:00 | EUR | - | 3 |
| Euro-Zone Services Confidence (NOV) | 29-11-2018 | 10:00 | EUR | - | 13.6 |
| German Consumer Price Index (MoM) (NOV P) | 29-11-2018 | 13:00 | EUR | - | 0.002 |
| German Consumer Price Index (YoY) (NOV P) | 29-11-2018 | 13:00 | EUR | - | 0.025 |
| French Gross Domestic Product (QoQ) (3Q P) | 29-11-2018 | 7:45 | EUR | - | 0.004 |
| French Gross Domestic Product (YoY) (3Q P) | 29-11-2018 | 7:45 | EUR | - | 0.015 |
| German Unemployment Change (000's) (NOV) | 29-11-2018 | 8:55 | EUR | - | - |
| German Unemployment Claims Rate s.a. (NOV) | 29-11-2018 | 8:55 | EUR | - | 0.051 |
| M4 Ex IOFCs 3M Annualised (OCT) | 29-11-2018 | 9:30 | GBP | - | 0.011 |
| M4 Money Supply (YoY) (OCT) | 29-11-2018 | 9:30 | GBP | - | 0.009 |
| Money Supply M4 (MoM) (OCT) | 29-11-2018 | 9:30 | GBP | - | (0.003) |
| Mortgage Approvals (OCT) | 29-11-2018 | 9:30 | GBP | - | - |
| Net Consumer Credit (OCT) | 29-11-2018 | 9:30 | GBP | - | - |
| Net Lending Sec. on Dwellings (OCT) | 29-11-2018 | 9:30 | GBP | - | - |
| BOJ Masai speaks in Fukuoka | 29-11-2018 | 1:30 | JPY | - | - |
| Jobless Rate (OCT) | 29-11-2018 | 23:30 | JPY | - | 0.023 |
| Job-To-Applicant Ratio (OCT) | 29-11-2018 | 23:30 | JPY | - | 1.64 |
| Tokyo Consumer Price Index (YoY) (NOV) | 29-11-2018 | 23:30 | JPY | - | 0.015 |
| Tokyo Consumer Price Index Ex-Fresh Food (YoY) (NOV) | 29-11-2018 | 23:30 | JPY | - | 0.01 |
| Tokyo CPI Ex-Fresh Food Ex-Fresh Food (YoY) (NOV) | 29-11-2018 | 23:30 | JPY | - | 0.007 |



| | | | | | |
|--|------------|-------|-----|---|---------|
| Industrial Production (MoM) (OCT P) | 29-11-2018 | 23:50 | JPY | - | (0.004) |
| Industrial Production (YoY) (OCT P) | 29-11-2018 | 23:50 | JPY | - | (0.025) |
| ANZ Activity Outlook (NOV) | 29-11-2018 | 0:00 | NZD | - | 7.4 |
| ANZ Business Confidence (NOV) | 29-11-2018 | 0:00 | NZD | - | (37.1) |
| ANZ Consumer Confidence (MoM) (NOV) | 29-11-2018 | 21:00 | NZD | - | (0.019) |
| ANZ Consumer Confidence Index (NOV) | 29-11-2018 | 21:00 | NZD | - | 115.4 |
| Building Permits (MoM) (OCT) | 29-11-2018 | 21:45 | NZD | - | (0.015) |
| Continuing Claims (NOV 17) | 29-11-2018 | 13:30 | USD | - | - |
| Initial Jobless Claims (NOV 24) | 29-11-2018 | 13:30 | USD | - | - |
| PCE Core (MoM) (OCT) | 29-11-2018 | 13:30 | USD | - | 0.002 |
| PCE Core (YoY) (OCT) | 29-11-2018 | 13:30 | USD | - | 0.02 |
| Personal Consumption Expenditure Deflator (MoM) (OCT) | 29-11-2018 | 13:30 | USD | - | 0.001 |
| Personal Consumption Expenditure Deflator (YoY) (OCT) | 29-11-2018 | 13:30 | USD | - | 0.02 |
| Personal Income (OCT) | 29-11-2018 | 13:30 | USD | - | 0.002 |
| Personal Spending (OCT) | 29-11-2018 | 13:30 | USD | - | 0.004 |
| Real Personal Spending (OCT) | 29-11-2018 | 13:30 | USD | - | 0.003 |
| Pending Home Sales (MoM) (OCT) | 29-11-2018 | 15:00 | USD | - | 0.005 |
| Pending Home Sales (YoY) (OCT) | 29-11-2018 | 15:00 | USD | - | (0.034) |
| EIA Natural Gas Storage Change (NOV 23) | 29-11-2018 | 15:30 | USD | - | (134) |
| EIA Working Natural Gas Implied Flow (NOV 23) | 29-11-2018 | 15:30 | USD | - | (134) |
| Fed's Evans Speaks on Panel on Inclusion at Boston Fed | 29-11-2018 | 19:00 | USD | - | - |
| FOMC Meeting Minutes (NOV 08) | 29-11-2018 | 19:00 | USD | - | - |

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