



29 Nov.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,151	0.0 %	4.1 %
BSE SENSEX	41,130	0.3 %	5.8 %
CNX BANK	32,123	0.0 %	5.9 %
CNX MIDCAP	17,212	0.0 %	(6.1) %
CNX SMALLCAP	5,761	0.0 %	(14.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,164	0.2 %	20.7 %
S&P 500	3,154	0.4 %	25.8 %
FTSE 100	7,416	(0.2) %	10.1 %
HANG SENG	26,894	(0.2) %	7.0 %
NIKKEI	23,409	(0.1) %	19.7 %
SHANGHAI COMPOSITE	2,890	0.5 %	17.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.29	(0.1) %	2.7 %
EUR/USD	1.10	(0.1) %	(3.9) %
GBP/USD	1.29	0.4 %	1.4 %
USD/JPY	109.48	0.4 %	(0.1) %
USD/AUD	1.48	0.2 %	4.0 %
USD/SGD	1.37	0.1 %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(0.5) %	24.9 %
Gold(INR/10g)	37,771	0.1 %	19.8 %
Gold Comex(USD/oz)	1,457	0.0 %	12.8 %
SILVER(INR/1Kg)	44,253	(0.0) %	15.7 %
Aluminium(USD/MT)	1,765	(0.3) %	(5.0) %
Copper(USD/MT)	5,882	(0.7) %	0.7 %

FIXED INCOME

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

Global Economy: A latest IMF research paper has claimed that the high household indebtedness could constrain future consumption growth and increase financial stability risks in China. The paper titled Assessing Macro-Financial Risks of Household Debt in China uses household survey data to analyze both macroeconomic and financial stability risks from the rapidly rising household debt in China. Eurozone economic confidence improved more than expected in November as sentiment among consumers and retailers strengthened, survey results from European Commission showed Thursday. The economic sentiment index rose to 101.3 from 100.8 in October. The consumer confidence index improved to -7.2 in November from -7.6 in the previous month. The reading came in line with flash estimate. Japan retail sales plunged a seasonally adjusted 14.4% on month in October, the Ministry of Economy, Trade and Industry said on Thursday, following the 7.2% increase in September. On a yearly basis, retail sales sank 7.1% following the 9.2% jump in the previous month. Private capital expenditure in Australia was down a seasonally adjusted 0.2% on quarter in the third quarter of 2019, the Australian Bureau of Statistics said on Thursday - worth A\$29.413 billion.

Global Equities: European stocks eased on Thursday following a shift in global risk appetite. Modest losses were witnessed in major regional indices amid lack of major economic cues.

Indian Economy: The 49th Meeting of the Central Sanctioning and Monitoring Committee (CSMC) under Pradhan Mantri Awas Yojana (Urban) approved 606 proposals from participating States for the construction of 3,31,075 houses with an overall investment of Rs 15,125 Cr involving central assistance of Rs 5,092 Cr. India's services sector has been the primary driver of growth of the Indian economy and has become fundamental to the nation achieving the US\$ 5 trillion target that it has set for itself, according to Confederation Of Indian Industries (CII). The sector has come into its own over the last decade and plays a pivotal role in providing highly skilled and productive job opportunities. Government has come out with the timeline for the new e-invoicing system under GST and the limit of application for each category. Accordingly, it has been decided by the government that businesses having a turnover of Rs.500 crore or more would take up e-invoicing from January 1, 2020 on voluntary and trail basis. Private equity investments witnessed a robust yearly growth in October with 72 PE deals garnering around USD 3.7 billion, even as merger and acquisition activity saw a downtrend, a report said on Thursday. According to Grant Thornton's monthly PE Dealtracker, private equity/venture capital transactions reported 22% and 25% increase in deal volumes and values, respectively as compared to October 2018.

Equity Markets: Key market barometers ended with decent gains on Thursday. Indices witnessed significant volatility on account of monthly F&O expiry. The November 2019 F&O contracts expired today, 28 November 2019. The barometer index, the BSE Sensex, rose 109.56 points or 0.27% to 41,130.17, as per the provisional closing data. The Nifty 50 index rose 53.60 points or 0.44% to 12,154.30, as per the provisional closing data. The Sensex hit a record high of 41,163.79 and the Nifty hit a record high of 12,158.80 in late trade today.

Corporate News: Aurobindo Pharma said that Auro Vaccines LLC, 100% subsidiary of Aurobindo Pharma USA Inc., USA, which in turn is 100% subsidiary of the company, has entered into a definitive agreement to acquire certain business assets from Profectus BioSciences Inc., USA., a clinical-stage vaccine development company. Shares of HDFC Bank will be in focus. The board of directors of the bank has constituted a Search Committee to identify a successor to Aditya Puri, the current Managing Director of the Bank, whose tenure ends on 26 October 2020. The Search Committee, over the next few months, shall evaluate internal and external candidates to ensure smooth transition. Shares of BPCL will be in focus. In accordance with the decision of the National Convention of Oil and Petroleum Workers held on 26 October 2019, the Unions had called for a strike on 28 November 2019 as a mark of protest against Govt. of India's decision to disinvest its entire stake in the corporation with



transfer of management control.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(147.6)	168.2	39.9
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)	45,140	44,265	36,852
F&O(INR cr)	2,460,451	1,386,953	1,351,853

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.9	16.0
NSE VIX	14.0	15.4	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	32,123	0.8 %	5.9 %	Energy	16,367	0.6 %	(1.0) %
IT	15,122	0.7 %	(4.5) %	Pharma	8,274	0.3 %	(11.8) %
Metals	2,657	2.1 %	(14.4) %	Finance	14,287	0.1 %	14.3 %
Auto	8,180	(0.3) %	(2.8) %	PSU	2,717	3.5 %	(19.7) %
FMCG	31,263	0.1 %	3.5 %	Real Estate	279	1.1 %	4.5 %

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>
Indiabulls	335	24.8 %	(60.5) %	Zee Entert	311	(2.7) %	(28.0) %
Bharti Inf	257	13.9 %	(18.3) %	Bosch	16,210	(2.4) %	(10.5) %
Vodafone I	7	11.9 %	(62.8) %	Hero Motoc	2,466	(2.3) %	(3.6) %
L&T Fin.Ho	115	6.3 %	(24.7) %	General In	259	(1.5) %	5.3 %
Bandhan Ba	583	5.5 %	10.0 %	HDFC Life	576	(1.5) %	50.1 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Private Sector Credit (YoY) (OCT)	29-11-2019	6:00	AUD	-	0.027
Gross Domestic Product (YoY) (SEP)	29-11-2019	19:00	CAD	-	0.013
KOF Leading Indicator (NOV)	29-11-2019	13:30	CHF	-	94.7
ECB Chief Economist Lane Speaks in Dublin	29-11-2019	1:30	EUR	-	-
German Retail Sales (YoY) (OCT)	29-11-2019	12:30	EUR	-	0.034
French Gross Domestic Product (YoY) (3Q F)	29-11-2019	13:15	EUR	-	0.013
German Unemployment Change (000's) (NOV)	29-11-2019	14:25	EUR	-	-
Euro-Zone Consumer Price Index Core (YoY) (NOV P)	29-11-2019	15:30	EUR	-	0.011
Italian Gross Domestic Product w.d.a. (YoY) (3Q F)	29-11-2019	16:30	EUR	-	0.003
Consumer Credit (YoY) (OCT)	29-11-2019	15:00	GBP	-	0.06
GfK Consumer Confidence (NOV)	29-11-2019	5:31	GBP	-	(14)
Construction Orders (YoY) (OCT)	29-11-2019	10:30	JPY	-	(0.068)
Jobless Rate (OCT)	29-11-2019	5:00	JPY	-	0.024
Industrial Production (YoY) (OCT P)	29-11-2019	5:20	JPY	-	0.013
Vehicle Production (YoY) (SEP)	29-11-2019	9:30	JPY	-	(0.022)
N.Z. Government 4-Month Financial Statements	29-11-2019	2:30	NZD	-	-
Building Permits (MoM) (OCT)	29-11-2019	3:15	NZD	-	0.072

..... End of Report

