



30 Nov.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,346	(0.1) %	12.0 %
BSE SENSEX	33,603	(0.0) %	12.2 %
CNX BANK	25,796	0.0 %	19.7 %
CNX MIDCAP	20,035	0.0 %	15.6 %
CNX SMALLCAP	8,707	0.0 %	23.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,941	0.4 %	20.4 %
S&P 500	2,626	(0.0) %	16.3 %
FTSE 100	7,394	(0.9) %	3.0 %
HANG SENG	29,624	(0.2) %	33.7 %
NIKKEI	22,597	0.5 %	15.3 %
SHANGHAI COMPOSITE	3,338	0.1 %	6.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.32	(0.3) %	(4.6) %
EUR/USD	1.19	(0.3) %	11.9 %
GBP/USD	1.35	1.1 %	9.5 %
USD/JPY	111.98	0.6 %	(3.4) %
USD/AUD	1.32	0.2 %	(3.6) %
USD/SGD	1.35	(0.1) %	(5.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(0.2) %	10.8 %
Gold(INR/10g)	29,441	(0.0) %	5.9 %
Gold Comex(USD/oz)	1,299	0.0 %	12.2 %
SILVER(INR/1Kg)	38,688	(1.0) %	(0.6) %
Aluminium(USD/MT)	2,100	(0.5) %	23.4 %
Copper(USD/MT)	6,800	(1.3) %	22.0 %

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: Euro area financial stability situation remains positive, supported by strong economic growth, but the threat of an abrupt market correction due to global risks remain, the European Central Bank said in a report released Wednesday. Improved economic conditions underpin the assessment that there is no generalized overvaluation in euro area financial markets, the ECB's latest Financial Stability Review said. Nevertheless, global risks in particular may trigger financial asset market corrections with negative repercussions on financial stability, noted the central bank. UK mortgage approvals declined to a 13-month low in October, the Bank of England showed Wednesday. The number of mortgages approved in October fell to 64,575 from 66,111 in September. The number was forecast to drop to 65,000. This was the lowest since September 2016, when it totaled 64,144.

Global Equities: European stocks extended gains as signs of progress on US tax reform and reports of a breakthrough in Brexit talks helped investors shrug off reports about North Korea's latest missile launch.

Indian Economy: Government is on course to achieve targets under Rural Housing Programme - Pradhan Mantri Awaas Yojana- Gramin (PMAY-G), noted a latest update from the Ministry of Rural Development. Prime Minister launched Pradhan Mantri Awas Yojana (Gramin) on 20th November, 2016 from Agra. A target of completing one crore new houses by 31st March, 2019 was set. Of these, 51 lakh houses are to be completed by 31st March, 2018. To meet the challenge of assisting 51 lakh Pradhan Mantri Awaas Yojana (Gramin) beneficiaries in construction of their homes by March, 2018, the Ministry of Rural Development, in partnership with the State Governments, has taken many steps, including setting month-wise target for completion of houses. The target for completion of 10 lakh houses by November, 2017 has been achieved on 29th November, 2017, i.e. before the appointed date for completion of 10 lakh houses.

Equity Markets: Local markets settled a tad lower after a range bound trading session. Most realty stocks gained. Key benchmark indices nudged higher in early trade. Stocks hovered in positive zone in morning trade. Stocks extended gains in mid-morning trade. Key equity benchmarks firmed up in afternoon trade. Key equity benchmarks dipped in negative zone in mid-afternoon trade. Stocks hovered in negative zone in late trade.

Corporate News: Chemical industry, a key manufacturing driver, is growing at 8 to 9% p.a. and has potential to grow much faster. However, there are no major investments being made in the sector by big international players, according to Rajeev Kapoor, Secretary, Department of Chemicals & Petrochemicals, Ministry of Chemicals & Fertilizers. Power Mech Projects has received the order worth Rs357crore under Make in India scheme from Andhra Pradesh Medtech Zone (AMTZ), an enterprise under the Government of Andhra Pradesh.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	121.8	157.1	12.3
MF(INR cr)	299.6	561.5	598.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,965	37,002	31,924
F&O(INR cr)	736,164	664,333	607,782

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.0	10.5	10.9
NSE VIX	13.1	13.3	12.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,796	(0.2) %	19.7 %	Energy	14,343	0.2 %	21.4 %
IT	11,233	(0.3) %	6.1 %	Pharma	9,352	0.4 %	(11.0) %
Metals	3,722	(0.4) %	19.8 %	Finance	10,516	(0.3) %	19.1 %
Auto	11,428	0.2 %	15.2 %	PSU	3,948	(0.9) %	12.0 %
FMCG	25,973	0.1 %	9.9 %	Real Estate	322	0.9 %	47.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bosch	20,066	5.7 %	(11.4) %	S A I L	78	(3.3) %	23.9 %
Shriram Tr	1,340	5.0 %	21.3 %	ICICI Pru	375	(2.4) %	(2.7) %
Piramal En	2,812	1.9 %	45.2 %	Axis Bank	550	(2.3) %	9.8 %
Bharti Inf	384	1.7 %	16.6 %	Petronet L	253	(2.0) %	22.4 %
Adani Port	403	1.6 %	17.9 %	Idea Cellu	93	(1.9) %	9.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Manufacturing Index (NOV)	30-11-2017	22:30	AUD	-	51.1
Building Approvals (MoM) (OCT)	30-11-2017	0:30	AUD	-	0.015
Building Approvals (YoY) (OCT)	30-11-2017	0:30	AUD	-	0.002
CBA Australia PMI Mfg (NOV)	30-11-2017	22:00	AUD	-	55.5
CoreLogic House Px (MoM) (NOV)	30-11-2017	23:00	AUD	-	0
HIA New Home Sales (MoM) (OCT)	30-11-2017	0:00	AUD	-	(0.061)
Private Capital Expenditure (3Q)	30-11-2017	0:30	AUD	-	0.008
Private Sector Credit (MoM) (OCT)	30-11-2017	0:30	AUD	-	0.003
Private Sector Credit (YoY) (OCT)	30-11-2017	0:30	AUD	-	0.054
Current Account Balance (3Q)	30-11-2017	13:30	CAD	-	-
Gross Domestic Product (QoQ) (3Q)	30-11-2017	6:45	CHF	-	0.003
Gross Domestic Product (YoY) (3Q)	30-11-2017	6:45	CHF	-	0.003
KOF Leading Indicator (NOV)	30-11-2017	8:00	CHF	-	109.1
Retail Sales Real (YoY) (OCT)	30-11-2017	8:15	CHF	-	(0.004)
Manufacturing PMI (NOV)	30-11-2017	1:00	CNY	-	51.6
Non-manufacturing PMI (NOV)	30-11-2017	1:00	CNY	-	54.3
Swift Global Payments CNY (OCT)	30-11-2017	1:00	CNY	-	-
ECB Executive Board member Yves Mersch speaks in Rome	30-11-2017	8:00	EUR	-	-
Euro-Zone Consumer Price Index Core (YoY) (NOV A)	30-11-2017	10:00	EUR	-	0.009
Euro-Zone Consumer Price Index Estimate (YoY) (NOV)	30-11-2017	10:00	EUR	-	0.014
Euro-Zone Unemployment Rate (OCT)	30-11-2017	10:00	EUR	-	0.089
German Unemployment Change (000's) (NOV)	30-11-2017	8:55	EUR	-	-
German Unemployment Claims Rate s.a. (NOV)	30-11-2017	8:55	EUR	-	0.056
GfK Consumer Confidence (NOV)	30-11-2017	0:01	GBP	-	(10)
Lloyds Business Barometer (NOV)	30-11-2017	0:01	GBP	-	26
Annualized Housing Starts (OCT)	30-11-2017	5:00	JPY	-	-
BOJ Harada makes a speech in Fukushima	30-11-2017	1:30	JPY	-	-
BOJ Iwata makes a speech in Tokyo	30-11-2017	0:00	JPY	-	-
Capital Expenditure (3Q)	30-11-2017	22:50	INR	-	0.015



Capital Spending excl Software (3Q)	30-11-2017	23:50	JPY	-	0.006
Company Profits (3Q)	30-11-2017	23:50	JPY	-	0.226
Company Sales (3Q)	30-11-2017	23:50	JPY	-	0.067
Construction Orders (YoY) (OCT)	30-11-2017	5:00	JPY	-	(0.116)
Housing Starts (YoY) (OCT)	30-11-2017	5:00	JPY	-	(0.029)
Jobless Rate (OCT)	30-11-2017	23:30	JPY	-	0.028
Job-To-Applicant Ratio (OCT)	30-11-2017	23:30	JPY	-	1.52
National Consumer Price Index (YoY) (OCT)	30-11-2017	23:30	JPY	-	0.007
National Consumer Price Index Ex-Fresh Food (YoY) (OCT)	30-11-2017	23:30	JPY	-	0.007
Natl CPI Ex Fresh Food, Energy (YoY) (OCT)	30-11-2017	23:30	JPY	-	0.002
Overall Household Spending (YoY) (OCT)	30-11-2017	23:30	JPY	-	(0.003)
Tokyo Consumer Price Index (YoY) (NOV)	30-11-2017	23:30	JPY	-	(0.002)
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (NOV)	30-11-2017	23:30	JPY	-	0.006
Tokyo CPI Ex-Fresh Food, Energy (YoY) (NOV)	30-11-2017	23:30	JPY	-	0.001
Vehicle Production (YoY) (OCT)	30-11-2017	4:00	JPY	-	0.017
ANZ Activity Outlook (NOV)	30-11-2017	0:00	NZD	-	22.2
ANZ Business Confidence (NOV)	30-11-2017	0:00	NZD	-	(10.1)
QV House Prices (YoY) (NOV)	30-11-2017	16:00	NZD	-	0.039
Terms of Trade Index (QoQ) (3Q)	30-11-2017	21:45	NZD	-	0.015
Chicago Purchasing Manager (NOV)	30-11-2017	14:45	USD	-	66.2
Continuing Claims (NOV 18)	30-11-2017	13:30	USD	-	-
EIA Natural Gas Storage Change (NOV 24)	30-11-2017	15:30	USD	-	(46)
EIA Working Natural Gas Implied Flow (NOV 24)	30-11-2017	15:30	USD	-	(46)
Fed's Kaplan Speaks in Dallas	30-11-2017	18:00	USD	-	-
Fed's Quarles Speaks on Payments Systems in Cleveland	30-11-2017	17:30	USD	-	-
Initial Jobless Claims (NOV 25)	30-11-2017	13:30	USD	-	-
PCE Core (MoM) (OCT)	30-11-2017	13:30	USD	-	0.001
PCE Core (YoY) (OCT)	30-11-2017	13:30	USD	-	0.013
PCE Deflator (MoM) (OCT)	30-11-2017	13:30	USD	-	0.004
Personal Consumption Expenditure Deflator (YoY) (OCT)	30-11-2017	13:30	USD	-	0.016
Personal Income (OCT)	30-11-2017	13:30	USD	-	0.004
Personal Spending (OCT)	30-11-2017	13:30	USD	-	0.01
Real Personal Spending (OCT)	30-11-2017	13:30	USD	-	0.006

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