



30 Nov.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,892	0.3 %	6.7 %
BSE SENSEX	36,170	1.3 %	9.1 %
CNX BANK	27,009	0.3 %	11.0 %
CNX MIDCAP	17,452	0.3 %	(8.6) %
CNX SMALLCAP	6,186	0.2 %	(22.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,339	(0.1) %	2.1 %
S&P 500	2,738	(0.2) %	1.6 %
FTSE 100	7,039	0.5 %	(8.0) %
HANG SENG	26,451	(0.9) %	(13.3) %
NIKKEI	22,263	0.4 %	(5.3) %
SHANGHAI COMPOSITE	2,567	(1.3) %	(23.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.85	(1.3) %	9.7 %
EUR/USD	1.14	0.9 %	(5.1) %
GBP/USD	1.28	0.4 %	(5.4) %
USD/JPY	113.37	(0.4) %	0.6 %
USD/AUD	1.37	(1.3) %	6.8 %
USD/SGD	1.37	(0.5) %	2.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	(16.5) %	(16.7) %
Gold(INR/10g)	30,360	(0.1) %	3.4 %
Gold Comex(USD/oz)	1,229	0.7 %	(6.1) %
SILVER(INR/1Kg)	35,804	0.2 %	(7.3) %
Aluminium(USD/MT)	1,913	(0.6) %	(15.2) %
Copper(USD/MT)	6,198	0.5 %	(13.7) %

FIXED INCOME

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

Global Economy: The minutes of the US Federal Open Market Committee meeting said almost all participants agreed another increase in rates was likely to be warranted fairly soon. The Fed noted a near-term rate hike would be dependent on incoming information on the labor market and inflation coming in line with or stronger than current expectations. The report said initial jobless claims rose to a six month high of 234,000, recording an increase of 10,000 on the week. German employment grew by 1.2% or 556,000 persons year-on-year to over 45.1 million, a record high since reunification and the ILO jobless rate eased from the previous month, data from the Federal Statistical Office showed on Thursday. The adjusted ILO jobless rate eased to 3.3 percent from 3.4%. The number of unemployed was roughly 1.44 million in October versus 1.45 million in September. UK Consumer confidence has slumped to its lowest level in a year amid the ongoing uncertainty surrounding Brexit, according to new data. Analysis from Centre for Economics and Business Research looked at confidence across a range of measures, including household finances, property prices, job security and business activity, both over the past 30 days and looking ahead to the next 12 months, noted media reports.

Global Equities: European stocks moved higher on Thursday, following a rally in other global shares. Asian shares jumped, tracking a Wall Street rally as dovish comments from Federal Reserve Chair Jerome Powell boosted investor sentiment towards riskier assets.

Indian Economy: The RBI stated that Interest Equalisation rate has been raised from 3% to 5% in respect of exports by the Micro, Small & Medium Enterprises (MSME) sector manufacturers under the Interest Equalisation Scheme on Pre and Post Shipment Rupee Export Credit. A total of eight States have achieved 100% saturation in household electrification under Saubhagya namely Madhya Pradesh, Tripura, Bihar, J&K, Mizoram, Sikkim, Telangana and West Bengal. Thus total 15 States in the country now have 100 % household electrification, noted RK Singh, Union Minister of State (IC) for Power and Renewable Energy. Many more State like Maharashtra, Uttarakhand, Himachal Pradesh, Arunachal Pradesh, Chhattisgarh etc. are left with small number of un-electrified households and expected to achieve saturation any time. With the present pace of electrification, Nation is expected to achieve 100% saturation in the country by 31st December, 2018. The decision to restructure loans of up to Rs 25 crore for the MSME sector is a step backwards and the risks to the banking sector will manifest in the next 6-9 months, Fitch Ratings said, according to media reports.

Equity Markets: Indian equity markets mirrored a rally in global stocks after dovish comment by US Federal Reserve Chairman pushed up appetite for risk assets. A fall in crude oil prices and a firmness in rupee also boosted investors' sentiment. The barometer index, the S&P BSE Sensex, surged 453.46 points or 1.27% to settle at 36,170.41. The Nifty 50 index surged 129.85 points or 1.21% to settle at 10,858.70.

Corporate News: Asian Oilfield Services has received a Letter of Award of Contract from Oil and Natural Gas Corporation for 'Hiring of Services for 2D Seismic Data Acquisition in un-appraised on land areas of Sedimentary Basins of India Sector 11A (Himalayan Foreland area) valued at Rs.27.65 crore. IT stocks could be in focus following the continued spurt in Indian Rupee. The rupee edged higher and closed at 69.82, compared with its close of 70.62 during the previous trading session. Domestic Oil Marketing Companies would be supported as WTI Crude oil futures extended their recent losses and fell under the key \$50 per barrel mark. Oil markets have been concerned about a supply overhang and broad worries over global economic growth.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	161.6	45.0	(44.7)
MF(INR cr)	87.0	122.9	468.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	47,406	31,352	34,997
F&O(INR cr)	1,884,936	993,951	973,985

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.5	19.5	15.4
NSE VIX	18.7	18.8	14.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,940	1.8 %	10.7 %	Energy	14,368	0.7 %	8.1 %
IT	14,465	(1.1) %	13.8 %	Pharma	9,091	0.8 %	5.4 %
Metals	3,177	1.9 %	(10.2) %	Finance	11,428	1.8 %	11.4 %
Auto	9,202	1.2 %	(16.8) %	PSU	2,931	0.6 %	2.7 %
FMCG	30,098	1.4 %	13.6 %	Real Estate	227	1.2 %	(23.4) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bajaj Auto	2,724	4.6 %	(3.0) %	Bharat Ele	85	(4.4) %	(41.4) %
Kotak Mah.	1,213	4.5 %	10.6 %	HCL Techno	1,013	(2.8) %	3.5 %
Bandhan Ba	487	4.4 %	2.4 %	Motherson	155	(2.7) %	(28.1) %
Shriram Tr	1,178	3.9 %	(19.8) %	Power Grid	181	(2.1) %	(7.4) %
Hindalco I	225	3.9 %	6.3 %	Oracle Fin	3,406	(2.0) %	(13.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Sector Credit (MoM) (OCT)	30-11-2018	0:30	AUD	-	0.004
Private Sector Credit (YoY) (OCT)	30-11-2018	0:30	AUD	-	0.046
Gross Domestic Product (MoM) (SEP)	30-11-2018	13:30	CAD	-	0.001
Gross Domestic Product (YoY) (SEP)	30-11-2018	13:30	CAD	-	0.025
Industrial Product Price (MoM) (OCT)	30-11-2018	13:30	CAD	-	0.001
Quarterly Gross Domestic Product Annualized (3Q)	30-11-2018	13:30	CAD	-	0.029
Raw Materials Price Index (MoM) (OCT)	30-11-2018	13:30	CAD	-	(0.009)
KOF Leading Indicator (NOV)	30-11-2018	8:00	CHF	-	100.1
Composite PMI (NOV)	30-11-2018	1:00	CNY	-	53.1
Manufacturing PMI (NOV)	30-11-2018	1:00	CNY	-	50.2
Non-manufacturing PMI (NOV)	30-11-2018	1:00	CNY	-	53.9
Euro-Zone Consumer Price Index Core (YoY) (NOV A)	30-11-2018	10:00	EUR	-	0.011
Euro-Zone Consumer Price Index Estimate (YoY) (NOV)	30-11-2018	10:00	EUR	-	0.022
Euro-Zone Unemployment Rate (OCT)	30-11-2018	10:00	EUR	-	0.081
Italian Gross Domestic Product w.d.a. (QoQ) (3Q F)	30-11-2018	11:00	EUR	-	0
Italian Gross Domestic Product w.d.a. (YoY) (3Q F)	30-11-2018	11:00	EUR	-	0.008
GfK Consumer Confidence (NOV)	30-11-2018	0:01	GBP	-	(10)
Lloyds Business Barometer (NOV)	30-11-2018	0:01	GBP	-	19
BOJ Outright Bond Purchase 10~25 Years	30-11-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	30-11-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	30-11-2018	1:10	JPY	-	-
Vehicle Production (YoY) (SEP)	30-11-2018	4:00	JPY	-	(0.003)
Annualized Housing Starts (OCT)	30-11-2018	5:00	JPY	-	-
Construction Orders (YoY) (OCT)	30-11-2018	5:00	JPY	-	0.01
Consumer Confidence Index (NOV)	30-11-2018	5:00	JPY	-	43
Housing Starts (YoY) (OCT)	30-11-2018	5:00	JPY	-	(0.015)
Fed's Williams Speaks on Global Economy at G30 in New York	30-11-2018	14:00	USD	-	-
Chicago Purchasing Manager (NOV)	30-11-2018	14:45	USD	-	58.4
Reliance Retail U.S. Biz Count (NOV 20)	30-11-2018	18:00	USD	-	1070



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