



31 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,890	0.4 %	1.9 %
BSE SENSEX	40,052	0.6 %	3.4 %
CNX BANK	30,169	0.6 %	(0.5) %
CNX MIDCAP	16,651	0.4 %	(9.2) %
CNX SMALLCAP	5,754	0.5 %	(14.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,187	0.4 %	16.5 %
S&P 500	3,047	0.3 %	21.5 %
FTSE 100	7,331	0.3 %	8.9 %
HANG SENG	26,668	(0.4) %	6.1 %
NIKKEI	22,843	(0.6) %	16.8 %
SHANGHAI COMPOSITE	2,939	(0.5) %	19.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.54	(0.1) %	1.6 %
EUR/USD	1.11	(0.2) %	(3.1) %
GBP/USD	1.29	(0.2) %	0.9 %
USD/JPY	108.93	0.3 %	(0.6) %
USD/AUD	1.46	(0.3) %	2.7 %
USD/SGD	1.36	(0.0) %	(0.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(0.9) %	18.3 %
Gold(INR/10g)	38,630	0.0 %	22.5 %
Gold Comex(USD/oz)	1,501	0.7 %	16.3 %
SILVER(INR/1Kg)	46,820	0.0 %	22.4 %
Aluminium(USD/MT)	1,747	0.5 %	(6.0) %
Copper(USD/MT)	5,883	0.1 %	0.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	(0.1) %	(0.9) %

Global Economy: US Federal Reserve announced its decision to lower the target range for the federal funds rate by 25 basis points to 1-1/2 to 1-3/4 percent. The Fed voted to cut interest by a quarter point on Wednesday for the third straight meeting, but a notable change to the accompanying statement suggests the central bank may put further monetary policy easing on hold. The Fed's accompanying statement removed a key line indicating the central bank would continue to "act as appropriate to sustain the expansion." US Gross domestic product grew at an annualized rate of 1.9% in the three months to September, the Commerce Department said in its initial estimate on Wednesday. This was down slightly from the 2% pace in the second quarter. Personal consumption expenditures, rose at a 2.9% annualized rate while government spending grew at a 2% rate. Eurozone economic sentiment index dropped to 100.8 in October from 101.7 in the previous month, survey results from the European Commission showed Wednesday. This was the lowest since January 2015, when the reading was 99.9. The industrial confidence index came in at -9.5 versus -8.9 a month ago. This was the weakest score since mid-2013. Germany's unemployment rate was unchanged at 3.1% in September, data from Destatis revealed. France's economy expanded expected in the third quarter on household spending and investment. Gross domestic product climbed 0.3% sequentially, the same pace of growth as seen in the second quarter. Japan retail sales surge 9.1% on year in September, following the 1.8% gain in August. On a seasonally adjusted monthly basis, retail sales spiked 7.1%, up from 4.6% in the previous month. Australia consumer prices were up 1.7% on year in the third quarter of 2019, the Australian Bureau of Statistics said on Wednesday, up from 1.6% in the previous three months.

Global Equities: Markets remained focused on the US Monetary policy announcement. DOW added 0.43%.

Indian Economy: Pension Fund Regulatory and Development Authority (PFRDA) has now permitted Overseas Citizen of India (OCI) to enroll in National Pension Scheme (NPS) at par with Non-Resident Indians. The Government has specified that an OCI may subscribe to the National Pension System governed and administered by PFRDA provided such person is eligible to invest as per the provisions of the PFRDA Act and the annuity/accumulated saving will be repatriable, subject to FEMA guidelines. Australia, Canada, the US and Russia have raised concerns yet again on India's pulses import policies which will now be discussed with other members at the World Trade Organization soon, media reports noted. Consumer credit growth continued to grow but at a slower pace than a year ago in the quarter ended June 2019, credit bureau TransUnion CIBIL said. Credit balances for consumer loan products grew 17.1% year-on-year (y-o-y) in the quarter ended June 2019 compared to 23.5% a year earlier.

Equity Markets: Local stocks advanced for the fourth straight trading session on Wednesday, supported by banks, FMCG and IT stocks. BSE Sensex rose 220.03 points or 0.55% to 40,051.87. The Nifty 50 index rose 57.25 points or 0.49% to 11,844.10. Sentiment was upbeat amid speculations that the government is mulling over changes in income tax implications on equity investment.

Corporate News: Container Corporation of India (Concor) reported consolidated net loss to Rs 331.95 crore in Q2 September 2019 as compared with net profit of Rs 335.10 crore in Q2 September 2018. Total income fell 5.14% to Rs 1800.45 crore in Q2 September 2019 over Q2 September 2018. TVS Motor Company announced their partnership with Cadisa, one of the largest, respected business groups across Guatemala and El Salvador. As a part of this association, Cadisa will facilitate the opening of 15 flagship outlets for TVS Motor Company in a phase-wise manner. Lakshmi Machine Works reported 71.31% fall in consolidated net profit to Rs 12.16 crore on 48.71% rise in total income to Rs 433.20 crore in Q2 September 2019 over Q2 September 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	214.8	35.2	14.1
MF(INR cr)	(78.6)	283.5	395.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	51,111	38,073	35,732
F&O(INR cr)	1,400,089	1,411,228	1,338,124

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.4	15.8
NSE VIX	16.7	16.7	17.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,988	0.4 %	(1.1) %	Energy	16,464	0.9 %	(0.4) %
IT	15,396	1.4 %	(2.8) %	Pharma	7,819	(0.1) %	(16.6) %
Metals	2,514	(0.2) %	(19.0) %	Finance	13,540	0.2 %	8.3 %
Auto	8,429	(0.2) %	0.2 %	PSU	2,413	3.7 %	(28.7) %
FMCG	32,274	1.0 %	6.9 %	Real Estate	266	(0.5) %	(0.5) %

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>
New India	171	7.7 %	(9.7) %	Bharti Inf	183	(5.2) %	(41.7) %
Interglobe	1,512	7.3 %	6.7 %	Hind.Zinc	213	(3.5) %	(25.1) %
GAIL (Indi	134	6.2 %	(24.7) %	Yes Bank	57	(2.3) %	(79.4) %
General In	318	5.6 %	29.0 %	Maruti Suz	7,557	(2.1) %	10.5 %
HDFC Life	632	3.6 %	64.8 %	Indiabulls	214	(2.0) %	(74.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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