

Indices	Value	Pts	Chg (%)
SENSEX	33724.44	45.20	0.13
NIFTY	10399.55	9.85	0.09
SGX NIFTY*	10401.50	(16.00)	(0.15)
DOW Jones	23580.78	22.79	0.10
S&P 500	2601.42	(1.00)	(0.04)
Nasdaq	6878.52	(10.64)	(0.15)
FTSE	7383.90	(25.74)	(0.35)
CAC	5360.09	(30.37)	(0.56)
DAX	13000.20	(59.64)	(0.46)
Shanghai Composite*	3305.96	(16.27)	(0.49)
Nikkei*	22428.87	(67.12)	(0.30)
Hang Seng*	29512.59	(173.60)	(0.58)

*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10400 CE	4747425	1.10
NIFTY	10400 PE	4263600	26.88

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	57.75	(0.36)	(0.62)
Brent Crude (USD)	63.62	(0.22)	(0.34)
Gold (INR)	29497	117.00	0.40
Silver (INR)	39266	25.00	0.06
Copper (INR)	446	(6.25)	(1.38)
Zinc (INR)	207	(3.35)	(1.59)
Cotton (INR)	18400	(80.00)	(0.43)

Currency	Value	Pts	Chg (%)
USD/Rupee	64.57	0.06	0.09
Euro/Rupee	76.85	0.15	0.20
Pound/Rupee	86.03	0.17	0.20
Euro /USD	1.19	0.00	0.05
Dollar Index	92.89	(0.01)	(0.01)

Volatility	Value	Pts	Chg (%)
CBOE VIX	9.87	0.20	2.07
India VIX	13.03	(0.48)	(3.55)

Interest Rates	Value	Bps change
India 10-Yr Yield	7.06%	6
US 10-Yr Yield	2.33%	(1)

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	4087.13	27083.79	571836.05
Advance (Nos)	1548(54%)	1017(54%)	NA
Declines (Nos)	1148(40%)	721(40%)	NA
Unchanged	184(6%)	88(6%)	NA

Market Summary

The market ended on positive note on Monday. The market breadth was positive 4 gainers for every 3 losers on BSE. 1548 shares advanced whereas 1148 shares declined and 184 shares were unchanged on BSE.

BSE Sensex gained 45 points or (0.1%) to close at 33724. Nifty 50 was up 10 point or (0.1%) to settle at 10400. BSE Mid-Cap index gained 88 points or (0.5%) to settle at 17022. BSE Small-Cap index advanced 139 points or (0.8%) to settle at 18163.

Top gainer in BSE Sensex were NTPC (3.1%), Axis Bank (2.8%), ONGC (1.4%), SBI (0.9%) and Wipro (0.8%) whereas top loser in BSE were Infosys (1.2%), Adani Ports (1.1%), Tata Motors (0.9%), Tata Steel (0.8%) and Tata Motors (D) (0.7%).

US markets closed mixed, Dow Jones Industrial Average closed at 23581, gaining 23 points (0.1%), S&P 500 was up 1 point (0.0%) to close at 2601 and Nasdaq declined 11 points (0.2%) to close at 6879.

European markets closed negative, FTSE was down 26 points (0.4%) to close at 7384, CAC declined 30 points (0.6%) to close at 5360 and DAX lost 60 points (0.5%) to close at 13000.

Macro News

- Ficci said that the July-September GDP is expected to improve to 6.2 % and rise further to 6.7 % in the third quarter of the current financial year. Economy slowdown due to demonetization and the adjustment impact of GST implementation seems to be bottoming out and as the new indirect tax regime stabilizes, the economy would see an improvement in its performance. The survey showed that wholesale inflation for the current financial was likely to be around 2.8% and consumer price indexed (CPI), or retail, inflation would be a little higher at 3.4% .

- Five states--Karnataka, MP, Maharashtra, Punjab, and UP -- have announced farm waivers involving over INR 1.2 trillion bank loans to tens of millions of farmers. In FY12, total amount of SDLs borrowed from the market was INR 1.6 trillion that jumped rapidly to INR 3.6 trillion in FY17, clipping at 18.2% per annum. The weighted average yield of SDLs on yearly basis of all the states has come down from 9.17% in FY14 to 7.60% in November 2017.

- Coal Import for October came in flat at 16.65 million tonnes, underpinned by cautious buying by consumers due to high prices in the overseas market. The figure for October 2016 was 16.68 million tonnes (mt). Import of coal declined 6.37% to 191.95 mt in 2016-17, mainly because of higher production by Coal India Ltd (CIL). CIL accounts for over 80% of the domestic coal production.

Institutional Activity	Cash	
	27-Nov	Nov'2017
FII (INR Crs)		
Buy	4088	106678
Sell	4513	128112
Net	(425)	(21434)
DII (INR Crs)		
Buy	2903	74403
Sell	2833	66408
Net	69	7995

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	3879.98	3975.37	348445	2.79
INDEX OPTIONS	45189.39	43842.80	1230912	1.60
STOCK FUTURES	16835.14	16847.94	1002454	(0.68)
STOCK OPTIONS	6120.65	6081.23	128061	(1.96)
Total	72025.16	70747.35		

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
NTPC	186.05	3.13
Axis Bank	559.65	2.73
ONGC	183.45	1.41
SBI	335.25	0.90
Wipro	294.80	0.77
Losers (INR)		
Infosys	997.50	(1.23)
Adani Ports	400.35	(1.14)
Tata Motors	421.15	(0.89)
Tata Steel	701.85	(0.83)
Tata Motors (D)	239.05	(0.69)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	18163.92	139.37	0.77
S&P BSE Mid-Cap	17022.21	87.89	0.52
S&P BSE Auto	25399.97	71.61	0.28
S&P BSE BANKEX	29359.42	137.98	0.47
S&P BSE Capital Goods	18513.08	85.61	0.46
S&P BSE FMCG	10337.91	(19.96)	(0.19)
S&P BSE Healthcare	14073.87	17.27	0.12
S&P BSE IT	10911.77	(24.81)	(0.23)
S&P BSE Metals	14136.51	(92.43)	(0.65)
S&P Oil & Gas	16099.44	(20.80)	(0.13)

Key News

Hyderabad metro: L&T cites cost overruns, seeks INR 16k Cr aid from TRS.

Larsen&Toubro has sought "additional financial support" from Telangana to cover cost overruns in the INR 16,000 Cr metro rail project that stemmed from delays in its implementation. It scheduled to inaugurate the first phase of the 72-km project tomorrow, touted to be the world's largest such project on public-private partnership in the sector. The cost overruns work out to over INR 3,000 Cr. The project, which was originally slated to go on stream in July this year, was extended till November 2018. The first phase comprises 30 km and 24 stations while the second phase of the remaining corridor barring a 6-km stretch - near Charminar - is expected to be commissioned by November 2018. L&T Metro Rail (Hyderabad) is an L&T subsidiary, which is developing the metro at a total cost is INR 16,375- INR 14,132 CR for the metro rail system and another INR 2,243 Cr for the real estate development.

Essar closes INR 2000 Cr Aegis sale; retires INR 75,000 Cr debt.

The embattled Essar Group today announced the closure of its BPO arm Aegis to Capital Square Partners (CSP), sale for INR 2,000 Cr and said it has been able to pare debt by INR 75,000 Cr. Earlier, it had concluded a USD 13 billion deal to sell its oil business to Russia's syRosneft. Aegis is present in nine countries, including India, South Africa, Australia, Saudi Arabia, England, Argentina, Sri Lanka, Peru and Malaysia. Essar had acquired Aegis Communication in 2003 and it has now grown over tenfold to become a significant player in the outsourcing industry.

Bank of Baroda launches digital Supply Chain Finance solution.

Bank of Baroda has launched digital Supply Chain Finance solution which aims to accelerate working capital loan opportunities for the small and medium enterprises and large corporate clients. The new product provides a range of supply chain finance products which covers pre- and post-shipment products like dealer and vendor finance. By increasing automation and straight-through processing, while enhancing reporting capabilities, the platform would reduce risks while uplifting satisfaction of the clients. The supply chain finance technology and processes have been designed to ensure faster approvals, seamless transaction processing and availability of finance to the SME customers.

International Data

Country	Data	Forecast	Previous
US	CB Consumer Confidence	123.9	125.9

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