

Indices	Value	Pts	Chg (%)
SENSEX	33618.59	(105.85)	(0.31)
NIFTY	10370.25	(29.30)	(0.28)
SGX NIFTY*	10396.50	26.50	0.26
DOW Jones	23836.71	255.93	1.09
S&P 500	2627.04	25.62	0.98
Nasdaq	6912.36	33.84	0.49
FTSE	7460.65	76.75	1.04
CAC	5390.48	30.39	0.57
DAX	13059.53	59.33	0.46
Shanghai Composite*	3308.13	(25.53)	(0.77)
Nikkei*	22569.50	83.26	0.37
Hang Seng*	29600.10	(80.75)	(0.27)

*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)	57.68	(0.31)	(0.53)
Brent Crude (USD)	63.21	(0.40)	(0.63)
Gold (INR)	29393	(72.00)	(0.24)
Silver (INR)	38619	(746.00)	(1.90)
Copper (INR)	437	(9.40)	(2.11)
Zinc (INR)	205	(1.95)	(0.94)
Cotton (INR)	18260	(70.00)	(0.38)

Currency	Value	Pts	Chg (%)
USD/Rupee	64.46	0.04	0.06
Euro/Rupee	76.37	0.12	0.16
Pound/Rupee	86.11	0.22	0.26
Euro /USD	1.19	0.00	0.10
Dollar Index	93.23	(0.04)	(0.05)

Volatility	Value	Pts	Chg (%)
CBOE VIX	10.03	0.16	1.62
India VIX	13.14	0.11	0.84

Interest Rates	Value	Bps change
India 10-Yr Yield	7.03%	(3)
US 10-Yr Yield	2.32%	-

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	4262.21	32659.59	652640.91
Advance (Nos)	1386(48%)	726(48%)	NA
Declines (Nos)	1333(47%)	792(47%)	NA
Unchanged	158(5%)	50(5%)	NA

Market Summary

The market ended on a negative note on Tuesday. The market breadth was evenly poised 1 gainers for every 2 losers on BSE. 1386 shares advanced whereas 1333 shares declined and 158 shares were unchanged on BSE.

BSE Sensex declined 106 points or (0.3%) to close at 33619. Nifty 50 was down 29 point or (0.3%) to settle at 10370. BSE Mid-Cap index gained 17 points or (0.1%) to settle at 17039. BSE Small-Cap index advanced 50 points or (0.3%) to settle at 18214.

Top gainer in BSE Sensex were BHEL (2.3%), Maruti Suzuki (1.5%), HDFC (1.0%), Coal India (1.0%) and Asian Paints (0.8%) whereas top loser in BSE were NTPC (1.7%), Bharti Airtel (1.6%), Infosys (1.3%), Tata Motors (D) (1.3%) and Tata Motors (1.2%).

US markets closed positive, Dow Jones Industrial Average closed at 23837, gaining 256 points (1.1%), S&P 500 was up 26 point (1.0%) to close at 2627 and Nasdaq advanced 34 points (0.5%) to close at 6912.

European markets closed positive, FTSE was up 77 points (1.0%) to close at 7461, CAC advanced 30 points (0.6%) to close at 5390 and DAX gained 59 points (0.5%) to close at 13060.

Macro News

- The first phase of 30-km stretch Hyderabad Metro Rail project has inaugurated, touted as the world's largest public-private partnership (PPP) in the sector. Commercial operations of the Metro project will begin November 29. The project has overcome many hurdles such as default by the first concessionaire Maytas Infra-led consortium and subsequent developments, crucial land acquisition by the state government and logjam for some time over route alignment, among others.

- Government is lobbying for a reduction in official interest rates in coming months as it expects inflation to stay close to a 4 % target. The finance ministry wants a rate cut sooner than that, putting a focus on the MPC meeting on Dec 5-6, or when it next convenes in February.

- TRAI has recommended upholding the basic principle of keeping internet free and not allowing any discrimination based on content. The regulator has exempted content delivery networks (CDNs), which enable mobile operators to deliver content within its network without going through the public internet as also allowing telecom operators to deploy traffic management practices (TMP). The operators though need to declare their TMPs when deployed and what impact it would have on the users.

Institutional Activity	27-Nov	Cash Nov'2017
FIIs (INR Crs)		
Buy	4439	111117
Sell	4427	132539
Net	12	(21422)
DII (INR Crs)		
Buy	3890	78293
Sell	4318	70726
Net	(428)	7567

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	3664.88	3351.12	350435	0.57
INDEX OPTIONS	55972.34	55915.14	1249747	1.53
STOCK FUTURES	23165.90	23890.63	1002203	(0.03)
STOCK OPTIONS	6043.45	6055.00	125504	(2.00)
Total	88846.57	89211.89		

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
BHEL	94.15	2.28
Maruti Suzuki	8633.00	1.48
HDFC	1728.90	1.03
Coal India	274.65	1.03
Asian Paints	1167.00	0.76
Losers (INR)		
NTPC	182.90	(1.69)
Bharti Airtel	490.40	(1.56)
Infosys	984.50	(1.30)
Tata Motors (D)	236.00	(1.28)
Tata Motors	415.95	(1.23)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	18213.65	49.73	0.27
S&P BSE Mid-Cap	17038.75	16.54	0.10
S&P BSE Auto	25410.74	10.77	0.04
S&P BSE BANKEX	29286.76	(72.66)	(0.25)
S&P BSE Capital Goods	18491.12	(21.96)	(0.12)
S&P BSE FMCG	10347.79	9.88	0.10
S&P BSE Healthcare	14036.06	(37.81)	(0.27)
S&P BSE IT	10851.54	(60.23)	(0.55)
S&P BSE Metals	14134.29	(2.22)	(0.02)
S&P Oil & Gas	16050.44	(49.00)	(0.30)

Key News

Technofab Engineering bags order worth INR 281 Cr

Technofab Engineering has bagged a new order in the domestic water sector valued at INR 281 Cr. The project is funded by Asian Development Bank. This order gives a further impetus to the company's standing in the water sector, coming as it does, soon after securing orders in Bhutan and Uganda, and recently completed projects in Tanzania and Zimbabwe. It may be recalled that the company sees this sector as a major thrust area. With this, the order backlog stands at around INR 2000 Cr of which the water sector now contributes close to 45%.

Genus Power bags order worth INR 453 Cr

Genus Power Infrastructures has won an order from EESL for supply of 13.5 lakh smart meters for the states of Haryana and Uttar Pradesh. This tender was opened in October by EESL for the supply of 50 lakh Smart Meters where Genus emerged as L2 bidder. The value of the order is pegged at around INR 453 Cr. Post this wind, the company's total order book stands at INR 1,226 Cr. Supplies are expected to commence from Q1FY19. This is a significant milestone for Genus which will enhance its market position.

BHEL bags INR 64 Cr order to set up 6 sewage treatment plants

As part of its strategy to diversify into new areas, Bharat Heavy Electricals Ltd (BHEL) has won an order of INR 64 Cr for setting up six decentralised sewage treatment plants (STPs) in Raipur, Chhattisgarh. The project for construction of the decentralised STPs shall be based on Sequential Batch Reactor (SBR) technology. BHEL has been in the water treatment business in the power as well as industrial segments and has set up several water treatment plants, seawater reverse osmosis (SWRO)-based desalination plants, among others. The company offers turnkey solutions to all segments of water management right from potable water applications to domestic sewage treatment.

ITC to invest INR 10,000 Cr to strengthen food processing business

ITC is reportedly planning to invest around INR 10,000 Cr in the coming years. This is a part of the company's INR 25,000 Cr investment package that it has planned to invest on 65 projects, including 20 integrated factories for consumer goods across the country. By 2030, the company has targeted a top-line of INR 1 lakh Cr of which, FMCG is expected to be one of the biggest contributors.

International Data

Country	Data	Forecast	Previous
US	Crude Oil Inventories	NA	-1.9M

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