

Indices	Value	Pts	Chg (%)
SENSEX	33602.76	(15.83)	(0.05)
NIFTY	10361.30	(8.95)	(0.09)
SGX NIFTY*	10303.50	(56.50)	(0.55)
DOW Jones	23940.68	103.97	0.44
S&P 500	2626.07	(0.97)	(0.04)
Nasdaq	6824.39	(87.97)	(1.27)
FTSE	7393.56	(67.09)	(0.90)
CAC	5398.05	7.57	0.14
DAX	13061.87	2.34	0.02
Shanghai Composite*	3329.09	(8.77)	(0.26)
Nikkei*	22598.67	1.47	0.01
Hang Seng*	29242.36	(381.47)	(1.29)

*As at 8.30 am

Most Active Call & Put Symbol	Strike Price	OI	Chg (%)
NIFTY	10400 CE	5896350	2.80
NIFTY	10400 PE	4963800	26.88

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	57.42	0.12	0.21
Brent Crude (USD)	63.42	0.31	0.49
Gold (INR)	29223	(170.00)	(0.58)
Silver (INR)	37948	(671.00)	(1.74)
Copper (INR)	439	2.90	0.66
Zinc (INR)	204	(0.85)	(0.41)
Cotton (INR)	18620	360.00	1.97

Currency	Value	Pts	Chg (%)
USD/Rupee	64.50	0.19	0.30
Euro/Rupee	76.52	0.29	0.38
Pound/Rupee	86.88	0.60	0.70
Euro /USD	1.19	0.00	0.15
Dollar Index	93.14	(0.02)	(0.03)

Volatility	Value	Pts	Chg (%)
CBOE VIX	10.70	0.67	6.68
India VIX	13.06	(0.09)	(0.68)

Interest Rates	Value	Bps change
India 10-Yr Yield	7.05%	2
US 10-Yr Yield	2.39%	6

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	4237.26	28727.28	736164.39
Advance (Nos)	1341(47%)	801(47%)	NA
Declines (Nos)	1376(48%)	936(48%)	NA
Unchanged	355%	76(5%)	NA

Market Summary

The market ended flat on Wednesday. The market breadth was evenly poised with 1 gainer for every 1 loser on BSE. 1341 shares advanced whereas 1376 shares declined and 355 shares were unchanged on BSE.

BSE Sensex declined 16 points or (0.1%) to close at 33603. Nifty 50 was down 9 point or (0.1%) to settle at 10361. BSE Mid-Cap index lost 28 points or (0.2%) to settle at 17011. BSE Small-Cap index was down 3 points or (0.0%) to settle at 18211.

Top gainer in BSE Sensex were Wipro (1.3%), Adani Ports (1.2%), Sun Pharma (0.8%), HUL (0.8%) and Tata Steel (0.7%) whereas top loser in BSE were Axis Bank (2.3%), HDFC (1.3%), Asian Paints (1.2%), SBI (1.1%) and TCS (1.0%).

US markets closed mixed, Dow Jones Industrial Average closed at 23941, gaining 104 points (0.4%), S&P 500 was down 1 point (0.0%) to close at 2626 and Nasdaq declined 88 points (1.3%) to close at 6824.

European markets closed mixed, FTSE was down 67 points (0.9%) to close at 7394, CAC advanced 8 points (0.1%) to close at 5398 and DAX gained 2 points (0.0%) to close at 13062.

Macro News

- Asian Development Bank (ADB) will provide a USD 500 million loan to improve rural road connectivity in five states. including Assam and West Bengal. Coal Import for October came in flat at 16.65 million tonnes, ADB will invest to construct and upgrade over 12,000-kilometre rural roads in Assam, Madhya Pradesh, Chhattisgarh, Odisha and West Bengal.

- India has recorded 45% jump in the number of petrol pumps in the last six years, possibly the highest growth rate in the world, as public and private sector firms jostled to capture retailing sites. With 60,799 outlets dispensing petrol and diesel at the end of October, India is behind only US and China in number of petrol pumps. Private firms own 5,474, or 9% of the total outlets, with Essar being the leader with 3,980 stations.

- The finance ministry is in the process of fixing the nuts and bolts of the INR 1.35 lakh Cr recapitalization bonds for public banks and the framework is expected to get nod from the finance minister in the next few days, said official sources. The Department of Financial Services, in consultation with the Reserve Bank of India, has submitted proposals to the Department of Economic Affairs, which is working on the final structure and the final structure will be known in the next few days after approval from the finance minister.

Institutional Activity	27-Nov	Cash Nov'2017
FIIs (INR Crs)		
Buy	4660	115777
Sell	5520	138058
Net	(859)	(22281)
DII (INR Crs)		
Buy	3805	82098
Sell	3034	73760
Net	771	8338

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	4034.07	2752.82	350624	0.05
INDEX OPTIONS	63995.24	64034.03	1276063	2.11
STOCK FUTURES	21814.87	22377.49	998836	(0.34)
STOCK OPTIONS	4104.21	4112.73	122256	(2.59)
Total	93948.40	93277.07		

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
Wipro	297.90	1.33
Adani Port	402.55	1.16
Sun Pharma	547.90	0.77
HUL	1277.35	0.75
Tata Steel	709.30	0.72
Losers (INR)		
Axis Bank	549.15	(2.32)
HDFC	1702.90	(1.31)
Asian Paints	1156.20	(1.18)
SBI	328.80	(1.16)
TCS	2658.55	(0.98)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	18211.07	(2.58)	(0.01)
S&P BSE Mid-Cap	17010.51	(28.24)	(0.17)
S&P BSE Auto	25455.60	44.86	0.18
S&P BSE BANKEX	29180.14	(106.62)	(0.36)
S&P BSE Capital Goods	18540.76	49.64	0.27
S&P BSE FMCG	10364.27	16.48	0.16
S&P BSE Healthcare	14065.54	29.48	0.21
S&P BSE IT	10825.27	(26.27)	(0.24)
S&P BSE Metals	14056.65	(77.64)	(0.55)
S&P Oil & Gas	16057.3	6.86	0.04

Key News

Cyquator to acquire stake in Zee Entertainment Enterprises

Cyquator Media Services has proposed to acquire 1,00,000 shares of Zee Entertainment Enterprises, on December 06, 2017 or any day thereafter within a period of 90 days by way of on-market inter-se transfer of shares amongst the promoter group.

Infosys' arm launches blockchain based trade finance solution for banks

Infosys' product subsidiary - Infosys Finacle, part of EdgeVerve Systems has launched the Finacle Trade Connect, a blockchain based trade finance solution for banks. The solution will help digitize the trade finance business process, including validation of ownership, certifying documents and making payments, while working on a distributed, trusted and shared network. The solution is available for a range of functions, including Bill Collection, Letters of Credit, Open Account for Trade, C2C Transactions for Trade, B2C transactions for Trade, PO Financing and Invoice financing. Infosys Finacle also launched a pilot trade finance network for banks to trial the Finacle Trade Connect solution. 11 banks have partnered with Infosys Finacle to be on the network.

L&T bags EPC order for 400 MW gas based power plant in Bangladesh

Bangladesh Power Development Board (BPDB) has awarded the contract for setting up Bibiyana South 400 MW Combined Cycle Power Plant Project to a consortium of Larsen & Toubro (L&T) and Samsung C&T Corporation of South Korea. L&T shall be executing the EPC contract valued at around USD 250 million. This 400 MW gas based power plant will be located at Bibiyana Upzila in Hobiganj district of Sylhet division in the north-eastern sector of Bangladesh, around 215 km by road from Agartala in India.

Jet ties up with Air France-KLM, alliance won't affect Eithad relation

India's Jet Airways and Air France-KLM has announced a partnership to route more traffic through Europe and on to North America, in a potential challenge to Gulf carrier Etihad Airways that is a shareholder in Jet. September that there was "continued weakness in the Gulf market both on the demand as well as yield but The Gulf will continue to be an important market and Jet will not reduce its operation there. Flights into Amsterdam and Paris, which Jet launched recently, were a "brighter spot"

International Data

Country	Data	Forecast	Previous
US	Unemployment Claims	241000	239000

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