

Domestic Market Performance

Indian market indices	08- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24148	-0.21	-3.46	39.10	24.20
BSE Sensex	79486	-0.07	-2.63	34.74	22.33
BSE 100	25504	-0.32	-3.76	44.89	27.49
BSE 200	11109	-0.53	-3.93	50.35	29.73
BSE 500	35664	-0.67	-3.78	53.99	30.56
BSE SmallCap	54914	-1.52	-0.95	103.71	43.24
BSE MidCap	46080	-1.18	-3.78	91.48	42.04
BSE LargeCap	9380	-0.43	-4.06	42.47	26.62
Sectoral indices					
BSE IT	41976	0.54	-1.77	47.39	33.00
BSE Oil & Gas	27324	-2.08	-9.40	57.19	41.18
BSE FMCG	21409	0.08	-6.95	29.85	12.87
BSE Auto	54041	0.14	-8.86	91.32	46.39
BSE Bankex	58858	-0.65	1.82	27.86	19.14
BSE Teck	19084	0.39	-3.28	47.05	34.59
BSE Capital Goods	69479	-0.90	-1.77	102.15	46.42
BSE Consumer Durable	61649	0.70	-5.26	63.84	35.73

Turnover (Rs Cr)	08- Nov	07- Nov
BSE Cash	6069	6472
NSE Cash	100043	101311
NSE F&O	12036030	44228356

Rs. Cr (Equity)	FII Inv 07- Nov	MF Inv 06- Nov	DII Inv 08- Nov
Buy	11,632	12,319	11,247
Sell	17,268	8,381	9,499
Net	-5,635	3,938	1,748
Net (MTD)	-19,994	6,988	14,014
Net (YTD)	-15,497	367,794	463,331

	08- Nov	1Day	Month ago	Year ago
USD	84.37	84.37	83.96	83.28
GBP	109.35	108.91	109.96	102.22
Euro	90.95	90.68	92.30	88.97
100 Yen	55.40	54.80	56.80	55.26

Indian markets

- Indian equities ended lower on Friday, led by realty and oil and gas stocks after the 25-basis point rate cut by the US Federal Reserve (Fed) to ease pressure on the US economy.
- The top losers were Trent, Coal India, Asian Paints, Tata Steel and Shriram Finance, down 2.03-3.18%.
- The top gainers were Mahindra & Mahindra, Titan Company, Tech Mahindra, Infosys and Nestle, up 1.45-2.89%.

Indian debt

- The interbank call money rate closed higher at 6.55% on Friday compared to 5.75% on Thursday.
- Government bond marginally higher on Friday due to fall in the US treasury yield after the US Federal Reserve decided to trim the key policy rate by 25bps.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed marginally lower at 6.81% on Friday compared to 6.82% on Thursday.
- Meanwhile, the new 10-year benchmark 06.79% GS 2034 paper closed at 6.78% on Friday.

Indian Rupee

- The rupee closed almost flat against the US dollar on Friday due to persistent outflows of foreign fund and on the outlooks of a stronger dollar after Donald Trump won the US election.

Regulatory

- The Reserve Bank of India has decided to expand the reporting requirement of forex transactions and include foreign exchange spot deals to ensure completeness of transaction data in the trade repository (TR) of the Clearing Corporation of India.
- Sebi plans to broaden the scope of Unpublished Price Sensitive Information (UPSI) by including proposed fundraising activities, restructuring plans, and one-time bank settlements.

Economy and Government

- India Foreign exchange reserves fell to \$682.1 billion as of November 1st, since the record high of \$704.9 billion in the last week of September.
- Prime Minister Narendra Modi is scheduled to visit Bihar on November 13 to lay the foundation stone for AIIMS Darbhanga.
- Government generated Rs 2,364 cr in revenue over three years by selling scrap from government offices.
- The government raised Rs 3,449 crore by selling a 1.6% stake in Hindustan Zinc Ltd (HZL) through a two-day offer-for-sale.
- The Centre procured 120.67 lakh tonnes of paddy so far from Punjab, or 65 per cent of the estimated target.
- The government plans to integrate the e-Shram portal database of over 300 million unorganised workers with the Gati Shakti portal to improve logistics planning and increase employment opportunities for the locals.

Domestic Debt Market Indicators

Instrument	08- Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.55%	5.75%	6.40%	6.75%	5.50%	5.75%
3-Month T-Bill	6.44%	6.43%	6.44%	6.61%	6.83%	6.91%
6-Month T-Bill	6.58%	6.59%	6.52%	6.71%	7.13%	7.09%
1-year T-Bill	6.55%	6.55%	6.55%	6.71%	7.18%	7.12%
3-Month CD	7.16%	7.15%	7.10%	7.16%	7.00%	7.23%
6-Month CD	7.38%	7.40%	7.44%	7.48%	7.37%	7.48%
1-year CD	7.50%	7.50%	7.54%	7.60%	7.60%	7.70%
3-Month CP	7.48%	7.48%	7.55%	7.63%	7.35%	7.68%
6-Month CP	7.75%	7.75%	7.75%	7.93%	7.71%	7.93%
1-year CP	7.80%	7.80%	7.80%	7.91%	7.90%	8.00%
1-year Gilt	6.70%	6.69%	6.58%	6.73%	7.14%	7.16%
3-year Gilt	6.71%	6.73%	6.68%	6.78%	7.16%	7.24%
5-year Gilt	6.75%	6.77%	6.73%	6.79%	7.19%	7.29%
1-year AAA	7.57%	7.59%	7.67%	7.64%	7.70%	7.62%
3-year AAA	7.35%	7.37%	7.49%	7.58%	7.70%	7.68%
5-year AAA	7.30%	7.32%	7.34%	7.51%	7.70%	7.68%
10-year G-sec	6.77%	6.80%	6.81%	6.88%	7.31%	7.27%
Net LAF (Rs Cr)	244733	276890	164089	165608	104121	-70696
Forex reserves (\$ bn)	682.13	684.81	704.89	667.39	578.78	586.11

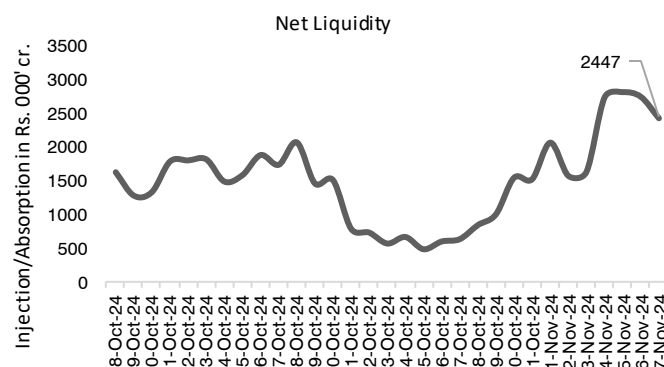
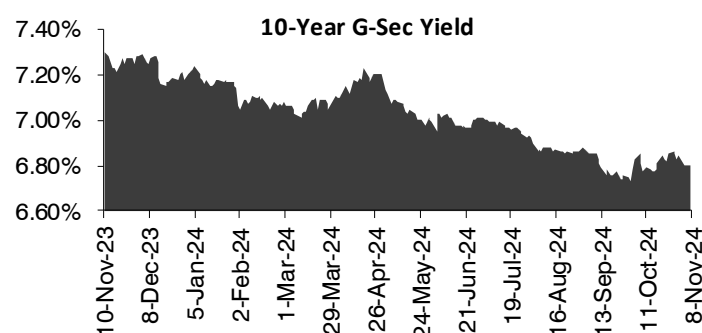
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.58	7.53	8.27	8.32	9.61	10.01
1 Year	6.70	7.57	8.31	8.36	9.65	10.05
3 Year	6.71	7.35	8.09	8.14	9.43	9.83
5 Year	6.75	7.30	8.15	8.20	9.49	9.89
10 Year	6.77	7.17	8.02	8.07	9.36	9.76

Rs. Cr (Debt)	FII Inv 07- Nov	MF Inv 06- Nov
Buy	446	6,687
Sell	504	8,590
Net	-58	-1,903
Net (MTD)	599	-2,299
Net (YTD)	102,526	-279,510

Economic Indicators	Latest	Quarter	Year Ago
CPI	5.49% (Sep-24)	5.08% (Jun-24)	5.02% (Sep-23)
WPI	1.84% (Sep-24)	3.36% (Jun-24)	-0.26% (Sep-23)
IIP	-0.1% (Aug-24)	5.9% (May-24)	10.9% (Aug-23)
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)
India Manufacturing PMI	57.5 (Oct-24)	58.1 (Jul-24)	55.5 (Oct-23)
India Service PMI	58.5 (Oct-24)	60.3 (Jul-24)	58.4 (Oct-23)

Capital markets

- Bharat Value Fund invested RS 235 cr in Haldiram Bhujawala for a minority stake.
- Tata Sons chose Singapore as a "key partner" for its semiconductor plans.
- Bridgestone Corporation announced a \$85 million investment to enhance production capacity and capabilities at its two plants in India.
- Paramesu Biotech Ltd filed preliminary papers with SeEBI to raise Rs 600 crore through an Initial Public Offering (IPO).
- Ecozen plans to raise \$75 million to fuel its expansion plan in the domestic and international markets.



Global market indices	08- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	43988.99	0.59	4.54	32.20	28.95
Nikkei 225	39500.37	0.30	1.45	40.86	22.80
FTSE	8072.39	-0.84	-1.44	5.77	9.06
Hang Seng	20728.19	-1.07	-0.95	1.61	17.99
Taiwan	23553.89	0.62	4.17	48.44	40.70

Global debt	08-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.30	4.31	4.04	3.99	3.49	4.52
UK 10-Year (%)	4.43	4.50	4.19	3.98	3.49	4.28
German 10-Year (%)	2.36	2.44	2.25	2.27	2.30	2.61
Japan 10-Year (%)	1.00	0.99	0.93	0.87	0.33	0.83

Domestic	08- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	77382	0.78	2.19	29.51	27.82
Silver (Rs / Kg)	91130	0.84	0.79	27.31	29.80
Aluminium (Rs / Kg)	244	-0.02	2.01	14.63	16.86
Copper (Rs / kg)	835	-0.54	-1.44	7.30	17.28
Lead (Rs / kg)	184	-2.29	-5.97	-3.55	-2.50
Zinc (Rs /Kg)	284	-1.22	-0.61	9.54	23.78
Nickel (Rs / kg)	1393	0.31	-6.38	-30.37	-9.07

Global	08- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2697.87	1.13	2.06	1.13	37.02
Silver (oz/\$)	3176.00	1.66	0.35	1.66	40.41
Brent (\$/bbl)	73.87	-2.33	-4.29	-2.33	-7.13
NYMEX crude (\$/bbl)	70.35	-2.78	-4.38	-2.78	-6.61

Upcoming market indicators

Date	Indicator	Previous
November 12	UK Unemployment Rate, September	4%
November 12	Eurozone Industrial Production, September	0.1%
November 13	US Inflation Rate YoY, October	2.4%
November 14	US PPI YoY, October	1.8%
November 14	India WPI Inflation YoY, October	1.84%

Source: Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org., , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites

Abbreviations: FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

Global markets:

- Wall Street stocks ended higher on Friday driven by optimism over potential business-friendly policies with a Republican-controlled congress.
- 10-year US bond yield ended higher at 3.65% following Federal reserve interest rate decision.
- FTSE index index ended lower on Friday pressured by Vistry's profit warning and weak stimulus news from Shanghai affecting China-linked stocks.
- Asian markets were trading lower at 8.30 AM.
- US Michigan Consumer Sentiment increased to 73 in November, the highest in seven months, compared to 70.5 in October.
- US Michigan Consumer Expectations increased to 78.5 points in November, from 74.1 in October.
- China's annual inflation rate stood at 0.3% in October, compared with September's figure of 0.4%.
- China's producer prices fell by 2.9% on-year in October, following a 2.8% drop in the previous month.

Commodity

- Crude oil prices fell \$2.01 cents to \$70.35 a barrel on the NYMEX as supply concerns from a Gulf hurricane eased, while China's new stimulus measures disappointed traders.
- Domestic gold prices ended higher due to geopolitical issues.

Forthcoming results

Date	Company
11 Nov	Hindalco Industries
11 Nov	Bank Of India
11 Nov	Britannia Industries

	Indicators	Oct-24	Sep-24	Aug-24	Jul-24	Jun-24	May-24	Apr-24	Mar-24	Feb-24	Jan-24
Debt Indicators	Currency in circulation (Rs billion)	35,042	34,994	35,231	35,600	35,814	35,792	35,455	34,849	34,342	33,902
	Repo rate	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.85%	6.75%	6.86%	6.92%	7.01%	6.99%	7.20%	7.05%	7.08%	7.14%
	Call rate	5.75%	6.24%	6.50%	6.50%	6.25%	6.24%	6.70%	6.24%	6.50%	6.75%
	Forex reserves (\$ billion; mthly. avg.)	696.1895	689	674	662	653	644	644	633	618	619
Economy	GDP	NA	NA	NA	NA	6.70%			7.80%		
	Fiscal deficit (Rs billion)	NA	NA	1582.31	1412.33	850.97	-1595.21	2101.36	1523.05	3987.63	1203.24
	IIP, %y/y	NA	NA	NA	4.80%	4.20%	5.90%	5.00%	5.40%	5.60%	4.20%
	Exports, \$ billion	NA	34.58	34.71	33.98	35.2	38.13	34.99	41.68	41.4	36.92
	Imports, \$ billion	NA	55.36	64.36	57.48	56.18	61.91	54.09	57.28	60.11	54.41
	Manufacturing PMI	57.5	56.5	57.5	58.1	58.3	57.5	58.8	59.1	56.9	56.5
	Services PMI	58.5	57.7	60.9	60.3	60.5	60.2	60.8	61.2	60.6	61.8
	GST collections (Rs crore)	187,346	173,240	174,962	182,075	173,813	172,739	210,267	178,484	168,337	172,129
	India crude oil import (mbpd)	NA		19.10	19.44	18.45	21.75	21.44	20.69	18.01	21.39
Sector update	Auto – Passenger vehicles	NA	-3.1%	-2.8%	-1.74%	4.30%	20.50%	35.40%	9.74%	-5.40%	-1.32%
	Auto – Two-wheelers	NA	15.8%	9.6%	12.45%	21.30%	1.09%	22.78%	15.27%	34.60%	26.20%
	Auto – Commercial vehicles	NA	-22.02%	-11.63%	-12.29%	-8.30%	-0.10%	14.40%	-7.74%	-4.20%	-4.40%
	Auto – Tractors	NA	3.7%	-5.8%	1.61%	3.60%	0.00%	-3.00%	-23.05%	-17.00%	-15.30%
	Banks – Deposit growth	11.80%	11.60%	10.90%	11.30%	11.80%	13.30%	12.50%	13.70%	13.10%	13.60%
	Banks – Credit growth	11.70%	13.00%	13.50%	13.90%	19.30%	19.50%	19.10%	19.10%	20.41%	20.30%
	Infra – Coal	NA	NA	-8.10%	6.80%	14.80%	10.20%	7.50%	8.70%	11.60%	10.20%
	Infra – Electricity	NA	NA	-5.00%	7.00%	7.70%	12.80%	9.40%	8.00%	7.50%	5.20%
	Infra – Steel	NA	NA	4.50%	7.20%	2.70%	7.60%	7.10%	5.50%	9.10%	7.00%
	Infra – Cement	NA	NA	-3.00%	5.50%	1.90%	-0.80%	0.60%	10.60%	9.10%	5.60%

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