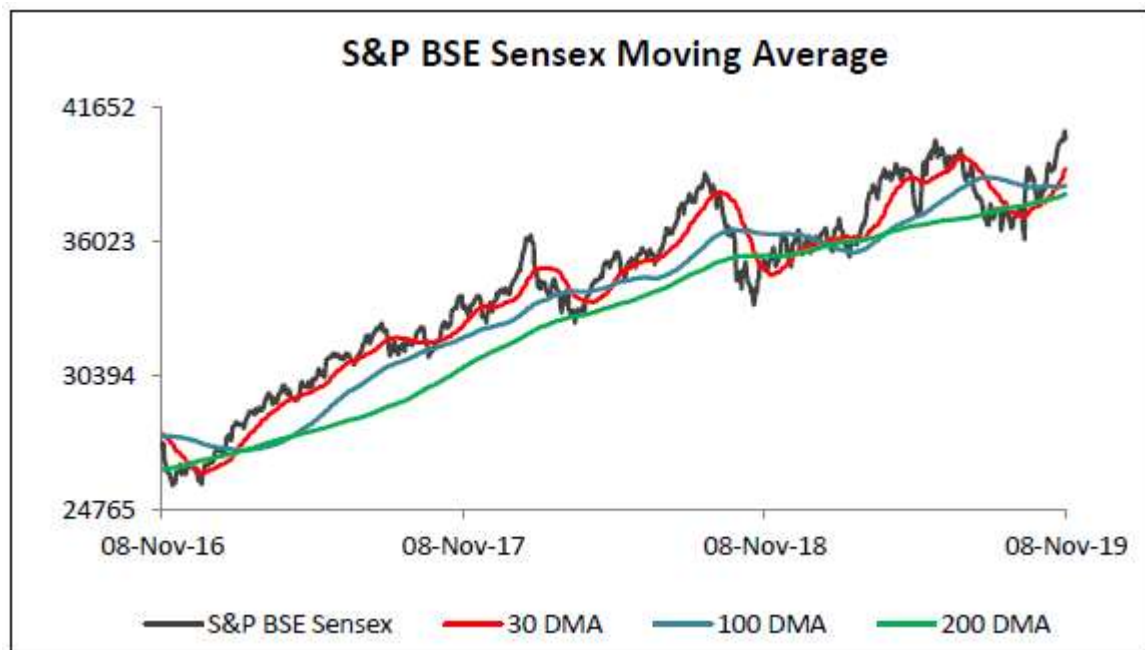


## Markets marginally lower amid volatility

Benchmark indices are trading marginally lower amid volatility tracking mixed global cues.

At 10:30 AM, the S&P BSE Sensex was trading at 40,247, down 76 points or 0.2%. Market breadth was weak and out of a total of 1,940 shares traded on the Bombay Stock Exchange, 1,020 advanced while 829 declined and 91 remained unchanged. The Nifty50 was down 25 points or 0.2% at 11,883.

10-year Indian G-Sec yields were trading at 6.563 in morning against the previous close of 6.554.



### **THE WEEK THAT WAS**

Stocks ended with small gains in the recently concluded week as gains triggered by signs of progress in US-China trade relations were mostly offset by Moody's downgrading India's outlook to negative from stable.

The Nifty settled below the psychological 12,000 mark after rising above that level during the week. The secondary indices underperformed the key benchmark indices. In the week ended on Friday, November 8, 2019, the Sensex rose 158.58 points or 0.39% to settle at 40,323.61.

The Nifty 50 index rose 17.55 points or 0.15% to settle at 11,908.15. The BSE Midcap index fell 159.47 points or 1.07% to settle at 14,731.11 while the BSE Smallcap index fell 126.17 points or 0.93% to settle at 13,474.75.

## GLOBAL MARKETS

Asian shares edged higher on Monday after US President Donald Trump said that trade talks with China were moving along “very nicely”. Japan's Nikkei was up 0.2%, while South Korea's KOSPI was off 0.2%. MSCI's broadest index of Asia-Pacific shares outside Japan was up 0.05%.

On Wall Street, the Dow inched up a tad while the S&P 500 climbed 0.3%. The Nasdaq Composite, too, added 0.5%.

Global Indices	Px Last	Change in %		52 Week		PE
		1 Day	1 Month	High	Low	
Russell 1000	1708	0.28	6.87	1640	1296	19.39
Russell 3000	1348	0.42	6.62	1297	989	19.88
Nasdaq	8475	0.48	8.33	8176	6190	25.07
FTSE 100	7359	-0.63	3.03	7790	6537	15.39
CAC 40	5890	-0.02	7.94	5601	4556	19.11
DAX	13229	-0.46	10.51	12887	10279	18.36
Nikkei	23392	0.26	8.36	23591	18949	18.38
Hang Seng	27651	-0.70	6.79	30280	24897	10.94
Shanghai Comp.	2964	-0.49	1.74	3288	2441	11.91

## INDIAN RUPEE

The Indian rupee on Monday hit a near one-month low against the US dollar tracking its Asian peers which fell on fresh doubts over US-China trade deal.

At 10.06 am, the home currency was trading at 71.36 a dollar, down 0.15% from Friday's close of 71.29.

## CRUDE OIL

Oil retreated from a seven-week high as investors weighed mixed signals on the progress of U.S.-China trade talks, while worsening violence in Hong Kong damped sentiment across financial markets.

## WEEK AHEAD

Final batch of results of India Inc for the quarter ended 30 September 2019, global cues, movement of rupee against the dollar, Brent crude oil price movement and investments by foreign portfolio investors (FPI) and domestic institutional investors (DII) will be closely watched this week.

On the macro front, India's industrial production data for September 2019 will be announced today. Manufacturing production data for September 2019 will also be announced on the same day. The WPI Inflation (YoY) for October 2019 will be unveiled on Thursday.

Overseas, the Japan Q3 GDP Growth Rate will be announced on November 14, 2019. The United States Retail Sales data for October 2019 will be released on November 15, 2019. In Europe, the ZEW Economic Sentiment Index for November 2019 will be announced tomorrow.

Fund Flow	Amount in Rs. Crore			
	Nature	Gross Pur.	Gross Sale	Net
<b>FII</b> s				
Equity	6344.71	5449.87	894.84	74985.54
Debt	636.80	1678.51	-1041.71	38528.72
<b>MF</b> <sup>1</sup>				
Equity	2200.56	3625.49	-1424.93	54402.93
Debt	7448.55	6497.46	951.09	451719.20

<sup>1</sup>As on 5<sup>th</sup> November 2019

*Source: Reuters, Capital Market, Internal*

**Mutual Fund investments are subject to market risks, read all scheme related documents carefully.**

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