

MONTHLY **NEWS** LETTER

NOVEMBER- 2018



MARKET MANTRA

Indira Securities Pvt. Ltd.

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Services
INDIRA GROUP
Offers under its Umbrella

- **EQUITY BROKING NSE& BSE**
- **DEPOSITORY SERVICES**
- **DEPOSITORY SERVICES**
- **COMMODITIES NCDEX & MCX**
- **DERIVATIVES NSE, BSE & FOREX**
- **CURRENCY DERIVATIVES NSE, BSE, MCX**
- **INSTITUTIONAL BROKING**
- **PORTFOLIO MANAGEMENT SERVICES**
- **E-BROKING**
- **MUTUAL FUND INVESTMENT**
- **ONLINE IPO BIDDING**
- **INSURANCE ADVISORY**
- **INSPIRE EDUCATION**

MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	34442.05	36227.14	-4.93%
NIFTY	10386.6	10930.5	-4.98%
BANK NIFTY	25153.00	25217.17	-0.25%

MARKET COMMENTARY

- Quarterly earnings, macroeconomic data, trend in global markets, investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs), the movement of rupee against the dollar and crude oil price movement will dictate trend on the bourses in the near term.
- Auto stocks will be in focus as the auto companies will start announcing monthly sales numbers for October 2018 starting from 1 November 2018.
- India's infrastructure output data for September will be unveiled on Wednesday, 31 October 2018. Infrastructure output in India increased 4.2% year-on-year in August of 2018, following an upwardly revised 7.3% rise in July.
- Nikkei Manufacturing PMI (Purchasing Managers' Index) for October 2018 will be announced on Thursday, 1 November 2018. The Nikkei India Manufacturing PMI rose to 52.2 in September of 2018 from a three-month low of 51.7 a month earlier.
- The Bank of Japan (BoJ) will decide on interest rate on Wednesday, 31 October 2018. The Bank of Japan left shorter-term interest rates unchanged at -0.1 percent on September 19th, and kept the target for the 10-year Japanese government bond yield at around zero, saying the economy will continue to expand modestly despite intensifying trade tensions.
- US ISM Manufacturing PMI data for October will be unveiled on Thursday, 1 November 2018. The Institute for Supply Management's Manufacturing PMI in the US fell to 59.8 in September of 2018 from 61.3 in August which was the highest reading since May of 2004
- US non-farm payrolls for October will come out on Friday, 2 November 2018. Non farm payrolls in the United States increased by 134 thousand in September of 2018, following an upwardly revised 270 thousand in August.



BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	14612.59	14763.2	-1.02%
SMALCAP	14201.37	14430.68	-1.59%
METAL	12524.55	13278.79	-5.68%
OIL&GAS	13246.92	14855.41	-10.83%
AUTO	19881.08	21476.52	-7.43%
TECK	7234.59	7730.69	-6.42%
BANKEX	28359.59	27992.18	1.31%
IT	14531.6	15628.94	-7.02%
FMCG	11127.84	11502.75	-3.26%
HC	14726.58	15025.34	-1.99%
PSU	7080.27	7171.38	-1.27%
CD	19142.33	19134.28	0.04%
POWER	1958.13	1929.43	1.49%
CG	17488.58	17108.89	2.22%
REALITY	1679.8	1702.94	-1.36%

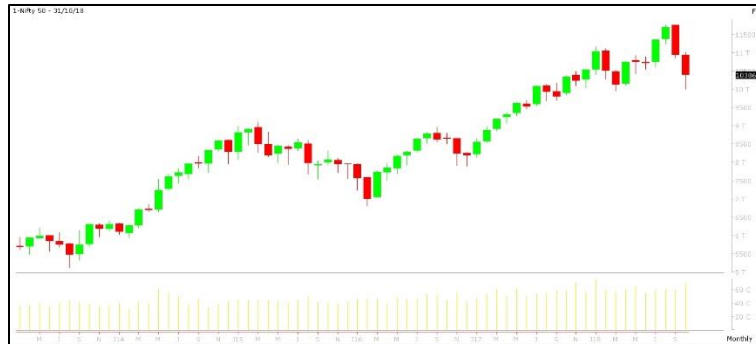
GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	25115.8	26458.3	-5.07%
NASDAQ	7305.9	8046.35	-9.20%
FTSE	7128.1	7510.2	-5.09%
NIKKEI	21784	24142.5	-9.77%
HANGSENG	25355	27788.5	-8.76%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1218.6	1193	2.15%
SILVER	14.31	14.65	-2.32%
CRUDE	65.12	73.63	-11.56%

CURRENCY	CLOSE	PREV. CLOSE
INR-1 USD	73.9936	72.5474
INR-1 EURO	83.9250	84.4428
INR-100 YEN	65.3600	63.900
INR-1 POUND	94.1016	94.908



NIFTY THIS MONTH = -544

NIFTY TECHNICAL

MONTHLY	RESISTANCE	SUPPORT
1	11504	10603
2	12080	10276
3	12406	9700

NIFTY MOVING AVERAGE(MONTHLY)

20 Days	10333
50 Days	9090
100 Days	7452
200 Days	5239

TOP GAINERS

SCRIPT	CMP	% CHANGE
Adani Power Ltd.	46.05	76.78
Balrampur Chini	106.85	45.67
Jet Airways	222.3	29.32
Sterlite Technologie	380.4	28.6
HEG Ltd.	4264.1	26.71

TOP LOSERS

SCRIPT	CMP	% CHANGE
Indian Energy Exchan	158.75	-90.08
Infibeam Avenues	32.25	-51.97
Kwality	6.39	-49.45
MothersonSumiSystems	162.8	-34.43
Dilip Buildcon Ltd.	431.4	-32.3

Stock at 52 Week High

SCRIPT	CMP
Divis Lab	1,484.80
Vinati Organics	1,550.15
Universal Cables	268.95
Kilitch Drugs	186.65
Prakash Steelage	0.60

Stock at 52 Week Low

SCRIPT	CMP
Ambuja Cements	197.10
Emami	395.10
Asahi India Glass	280.65
Dhanuka Agritech	363.30
Sintex Plastics Tech	25.95

FII & DII ACTIVITY- OCT 2018

	AMOUNT
FII	-29201
DII	+26034

<i>DATE</i>	<i>TIME</i>	<i>CURRENCY</i>	<i>ECONOMIC DATA</i>	<i>FORECAST</i>	<i>PREVIOUS</i>
ThuNov 1	3:00pm	GBP	Manufacturing PMI	53	53.8
	5:30pm	GBP	BOE Inflation Report		
		GBP	MPC Official Bank Rate Votes	0-0-9	0-0-9
		GBP	Monetary Policy Summary		
		GBP	Official Bank Rate	0.75%	0.75%
	6:00pm	GBP	BOE Gov Carney Speaks		
	7:30pm	USD	ISM Manufacturing PMI	59	59.8
FriNov 2	3:00pm	GBP	Construction PMI	52	52.1
	6:00pm	USD	Average Hourly Earnings m/m	0.20%	0.30%
		USD	Non-Farm Employment Change	193K	134K
		USD	Unemployment Rate	3.70%	3.70%
SatNov 3					
SunNov 4					
MonNov 5	3:00pm	GBP	Services PMI		53.9
	8:30pm	USD	ISM Non-Manufacturing PMI		61.6
TueNov 6	All Day	USD	Congressional Elections		
WedNov 7	5:30am	JPY	Average Cash Earnings y/y		0.80%
	9:00pm	USD	Crude Oil Inventories		
ThuNov 8	Tentative	CNY	Trade Balance		213B
	Tentative	EUR	EU Economic Forecasts		
FriNov 9	12:30am	USD	FOMC Statement		
		USD	Federal Funds Rate	<2.25%	<2.25%
	3:00pm	GBP	GDP m/m		0.00%
		GBP	Manufacturing Production m/m		-0.20%
		GBP	Prelim GDP q/q		0.40%
		GBP	Prelim Business Investment q/q		-0.70%
	7:00pm	USD	PPI m/m		0.20%
		USD	Core PPI m/m		0.20%
	8:30pm	USD	Prelim UoM Consumer Sentiment		98.6

SatNov 10					
SunNov 11					
MonNov 12					
TueNov 13	3:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
		GBP	RPI y/y		
	3:30pm	EUR	German ZEW Economic Sentiment		
WedNov 14	5:20am	JPY	Prelim GDP q/q		
	7:30am	CNY	Fixed Asset Investment ytd/y		
		CNY	Industrial Production y/y		
	12:30pm	EUR	German Prelim GDP q/q		
	3:00pm	GBP	Average Earnings Index 3m/y		
		GBP	Unemployment Rate		
	3:30pm	EUR	Flash GDP q/q		
	7:00pm	USD	CPI m/m		
		USD	Core CPI m/m		
ThuNov 15	3:00pm	GBP	Retail Sales m/m		
	7:00pm	USD	Core Retail Sales m/m		
		USD	Retail Sales m/m		
		USD	Empire State Manufacturing Index		
		USD	Philly Fed Manufacturing Index		
	9:30pm	USD	Crude Oil Inventories		
FriNov 16	Tentative	GBP	Inflation Report Hearings		
SatNov 17					
SunNov 18					
MonNov 19					
TueNov 20	Tentative	All	OPEC-JMMC Meetings		
	7:00pm	USD	Building Permits		
		USD	Housing Starts		
WedNov 21	3:00pm	GBP	Public Sector Net Borrowing		
	7:00pm	USD	Core Durable Goods Orders m/m		
		USD	Durable Goods Orders m/m		
	9:00pm	USD	Crude Oil Inventories		

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