



# Current Market Scenario

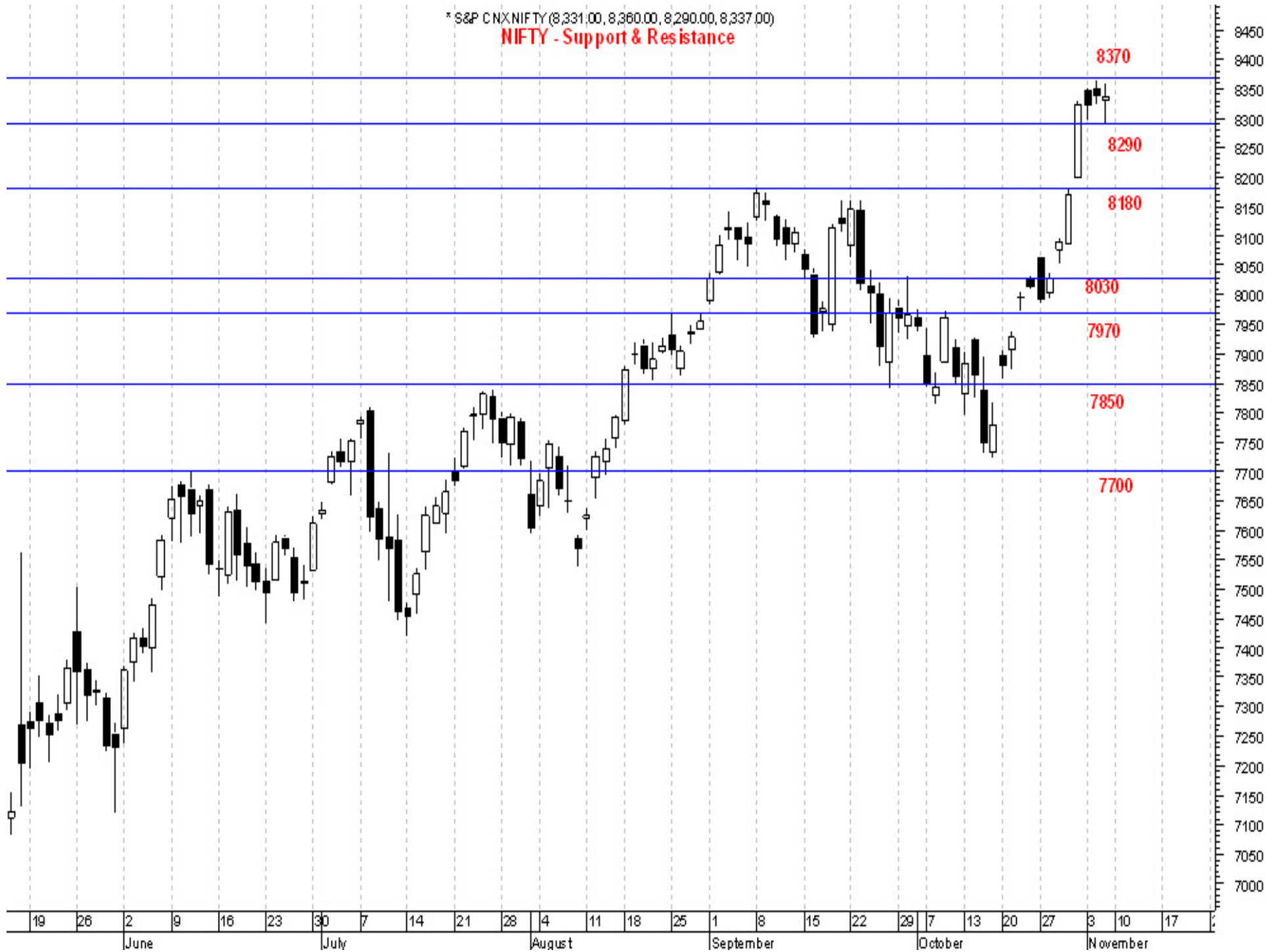
\* S&P CNXNIFTY (8,331.00, 8,360.00, 8,290.00, 8,337.00)

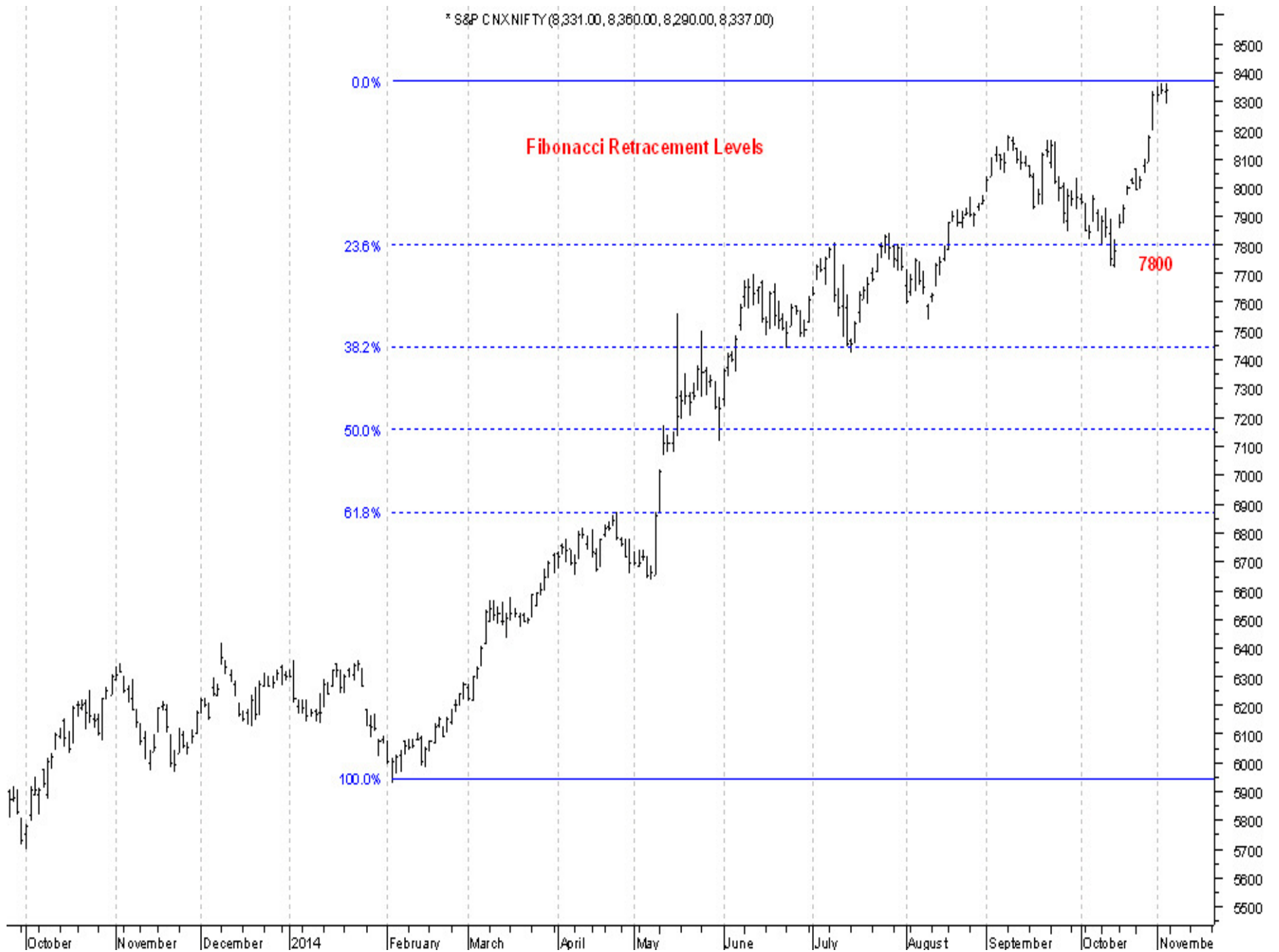
Nifty Channel Lines

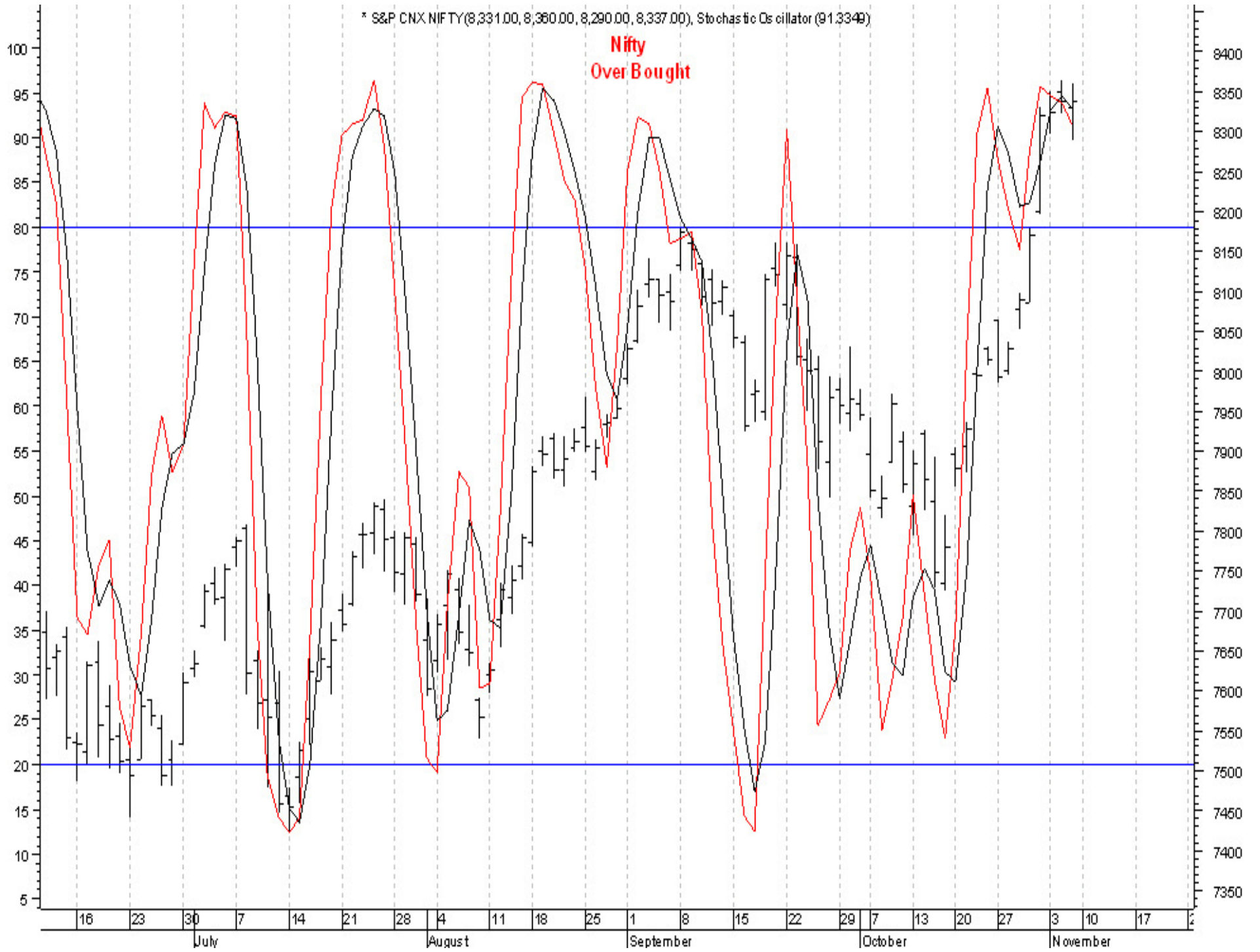


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### NIFTY - Support & Resistance







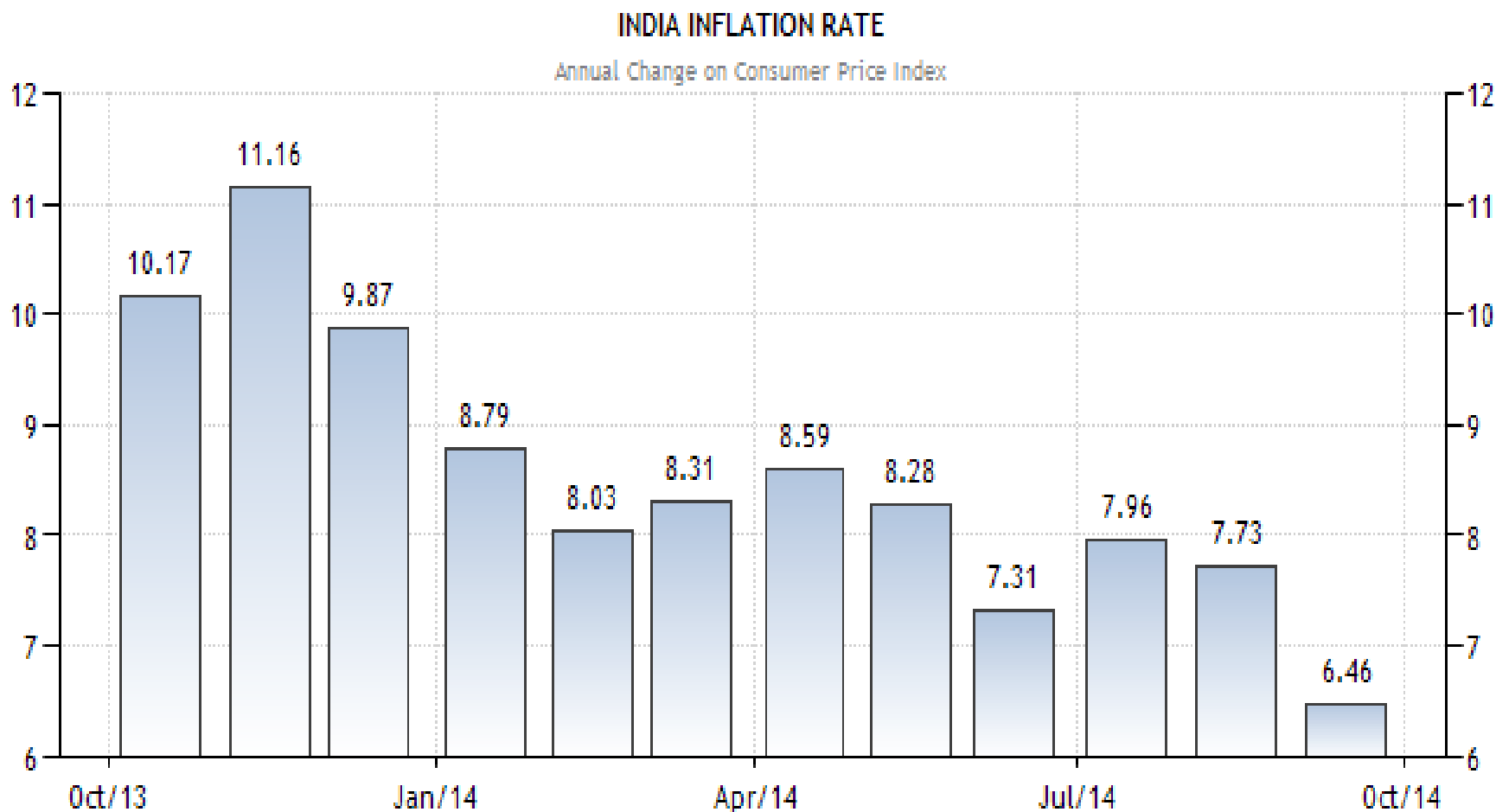
## Markets at Historic Highs

- Index heavy weights lift indices to record levels
- Developed markets on roller coaster ride
- Crude Oil continues to bleed
- Action in financial stocks on rate cut hopes

### INDEX WATCH

INDEX	Nov 7	Oct 10	% Change
Nifty	8337	7859	6.0
Sensex	27868	26297	5.9
CNX Midcap	11995	11230	6.8
BSE Small Cap	11117	10611	4.7

# Consumer Inflation Coming Down

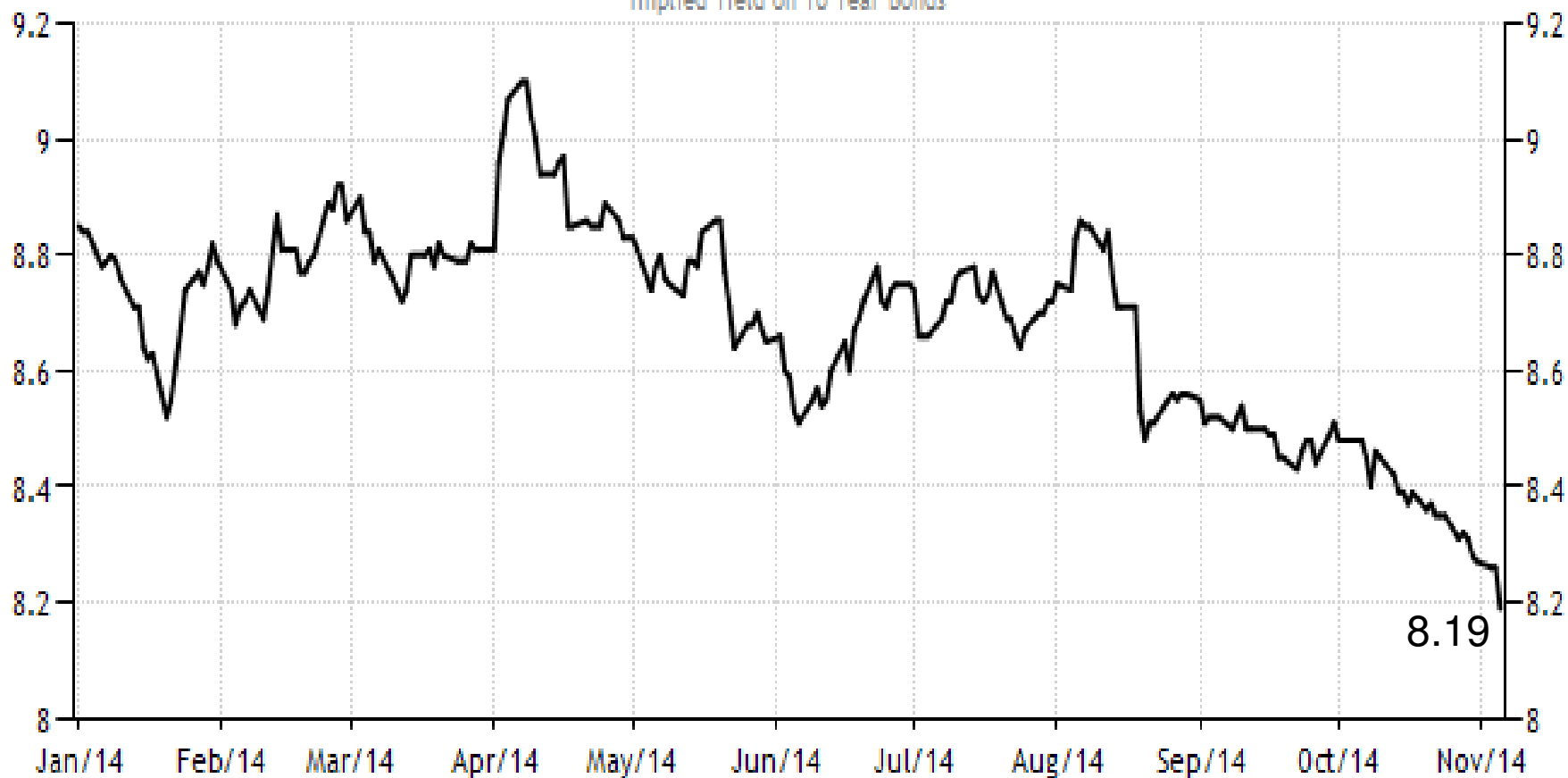


SOURCE: WWW.TRADINGECONOMICS.COM | MINISTRY OF STATISTICS AND PROGRAMME IMPLEMENTATION (MOSPI), INDIA

# Govt. Bond Yield Signals Rate Cut Soon

## INDIA GOVERNMENT BOND 10Y

Implied Yield on 10 Year Bonds

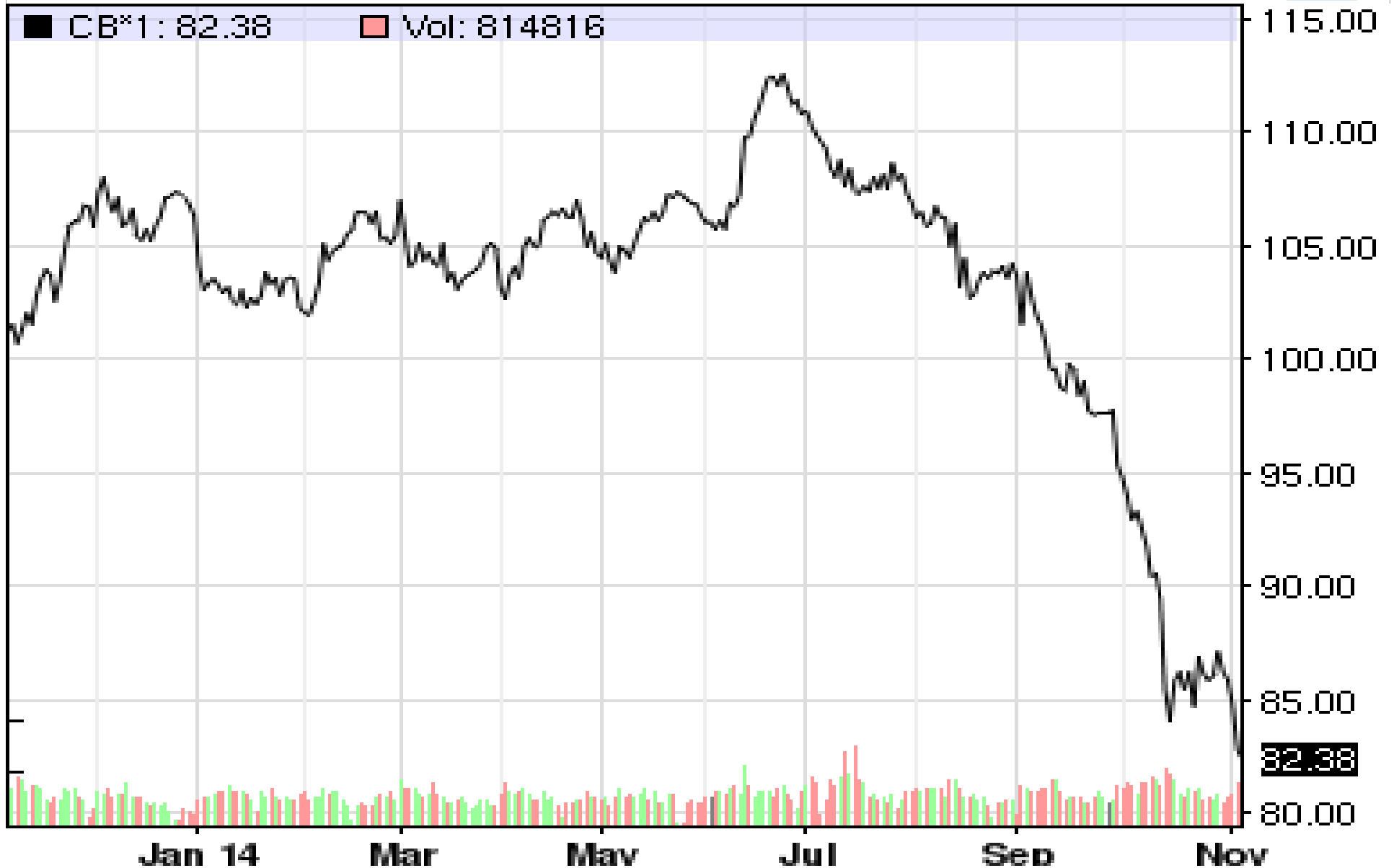


SOURCE: WWW.TRADINGECONOMICS.COM | MINISTRY OF FINANCE, GOVERNMENT OF INDIA





# Brent Crude Continuing Fall





# Diesel Price Decontrolled

- Fall in crude oil prices aided Govt. to decontrol long pending diesel prices
- Decontrol will lead to lower oil subsidy outflow for the Government



# US Ends Quantitative Easing

- US Fed initiated three QE program to revive US economy from 2008 financial crisis
- QE 3 started from Sep 2012, gradually tapered off and ended on Oct 2014
- QE ending will make US \$ stronger and signals revival in US economy



## Japan and ECB To Continue With More QE

- Bank of Japan increased its bond buying from 50 Trillion Yen to 80 Trillion Yen per year( US \$60 Billion / month)
- European Central Bank (ECB) announced stimulus measures to revive economy
- Action from Bank of Japan and ECB neutralised impact of US Quantitative Easing



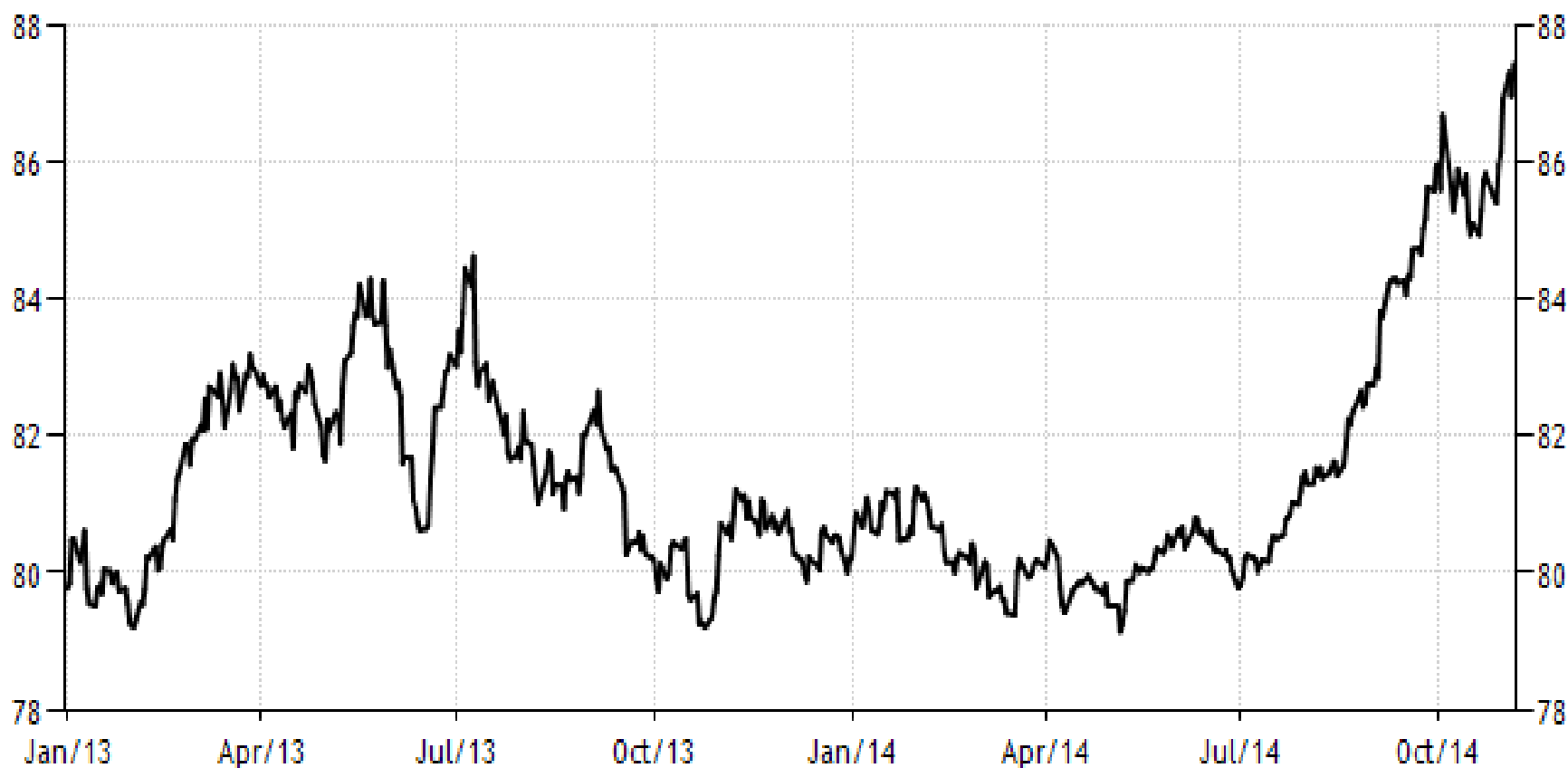
# Impact of Global Central Bank Actions

- Contrary actions by major central banks led to zero impact in markets on US Fed Tapper
- US \$ to remain strong while Euro and Yen to be weak in coming days
- Overall global currency and commodity markets to be very active



# Dollar Index Showing Uptrend

UNITED STATES DOLLAR



SOURCE: [WWW.TRADINGECONOMICS.COM](http://WWW.TRADINGECONOMICS.COM) | OTC INTERBANK



## Q2 Result – Sensex Companies

	% Change (YoY)	
	Sep 2014	Sep 2013
Sales	<b>3.7</b>	<b>23.4</b>
Net Profit	<b>11.2</b>	<b>20.1</b>

**Results of 13 companies**



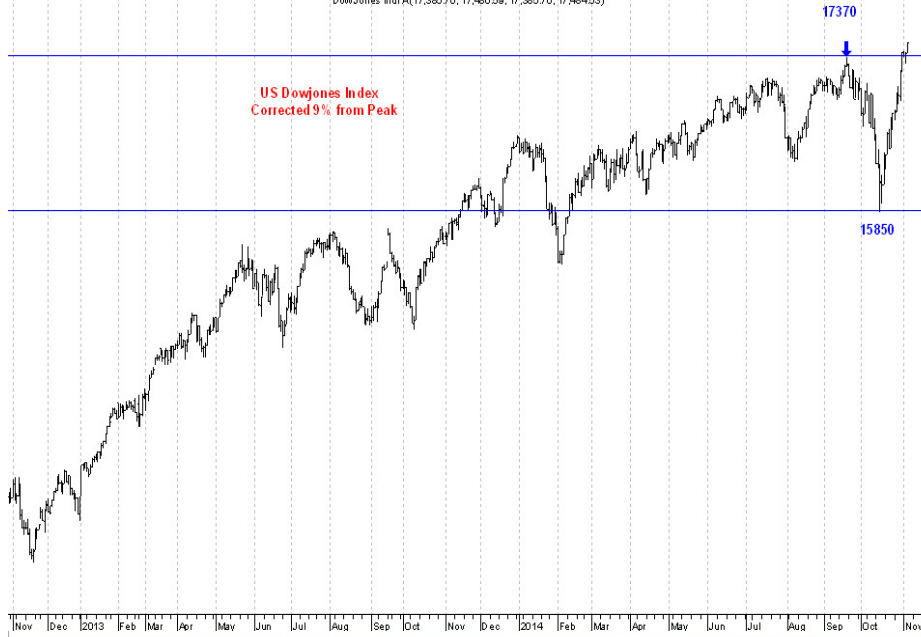
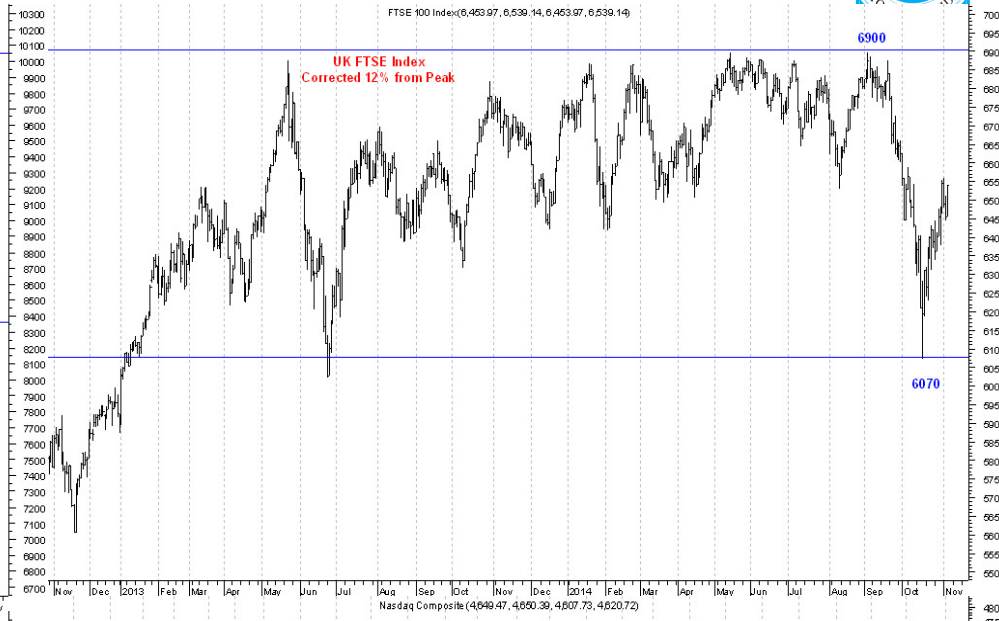
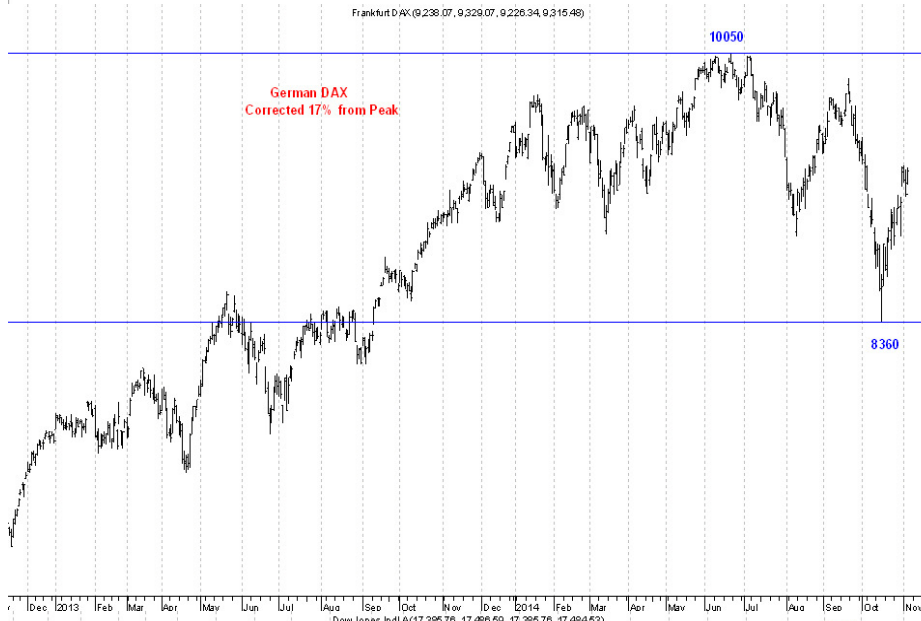
## Q2 Result Performance

	% Change (YoY)	
	Sep 2014	Sep 2013
Sales	<b>3.7</b>	<b>15.7</b>
Net Profit	<b>14.9</b>	<b>13.6</b>

**Results of 224 companies**



# Roller Coaster Ride In Global Market





# International Gold Price At 5 Yr Low

5 Year Gold Price in USD/oz

Last Close: 1142.30

High: 1889.70 Low: 1062.40 ▲47.20 4.31%



goldprice.org

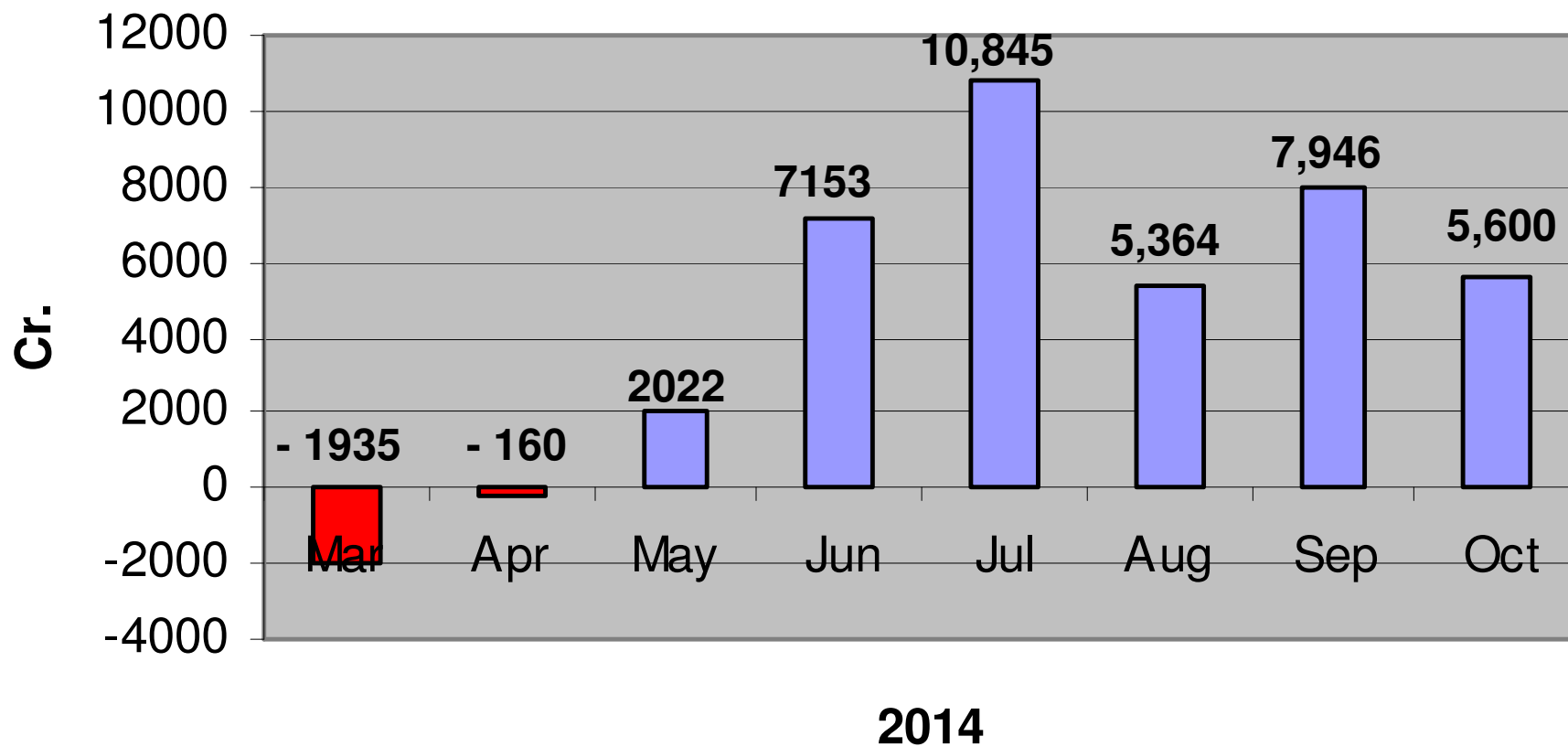
Thursday, November 06, 2014



# FII Activity - Equity

<b>2014</b>	<b>Equity \$ Bn</b>
Jan	<b>0.1</b>
Feb	<b>0.2</b>
March	<b>3.3</b>
April	<b>1.6</b>
May	<b>2.3</b>
June	<b>2.3</b>
July	<b>2.1</b>
Aug	<b>0.9</b>
Sep	<b>0.8</b>
Oct	<b>- 0.1</b>
Till Nov 7	<b>0.7</b>
Total	<b>14.4</b>

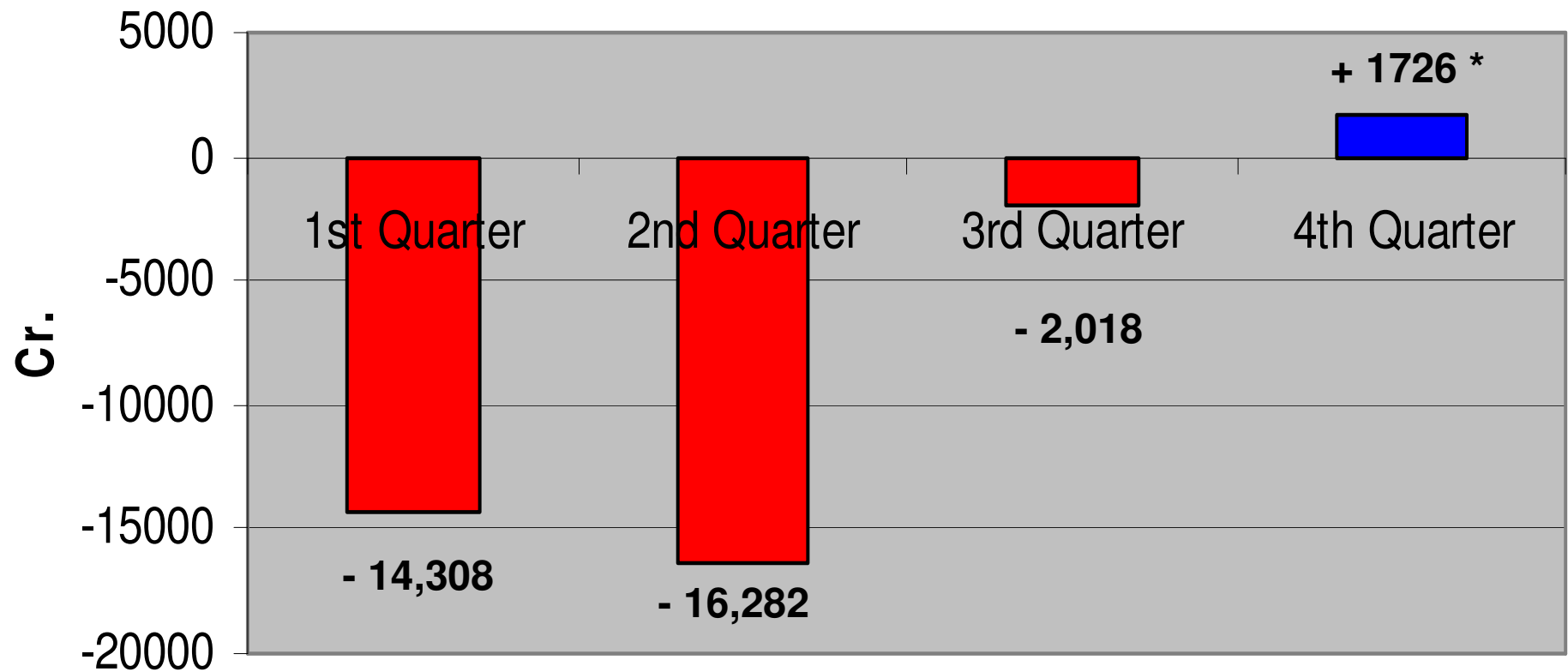
## Domestic Mutual Fund Flows



# DII Turning into Buyers



## Net DII Flows



2014

\* Till Nov 6, 2014

DII includes Insurance, Banks, Mutual Funds



## Events to Watch

- Q2 Results
- Commodity Prices
- IIP Data and Inflation on Nov 12
- RBI monetary policy meet on Dec 2



**Thank You**