



01 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,248	0.2 %	36.3 %
BSE SENSEX	38,068	0.2 %	34.7 %
CNX BANK	21,452	0.2 %	17.8 %
CNX MIDCAP	16,983	0.1 %	48.1 %
CNX SMALLCAP	5,823	(0.3) %	64.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,782	1.2 %	(2.7) %
S&P 500	3,363	0.8 %	4.1 %
FTSE 100	5,866	(0.5) %	(22.9) %
HANG SENG	23,459	0.8 %	(17.8) %
NIKKEI	23,185	(1.5) %	(0.1) %
SHANGHAI COMPOSITE	3,218	(0.2) %	4.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.69	0.2 %	3.5 %
EUR/USD	1.17	0.7 %	4.4 %
GBP/USD	1.29	0.9 %	(2.5) %
USD/JPY	105.61	(0.0) %	(2.8) %
USD/AUD	1.41	(1.2) %	(1.4) %
USD/SGD	1.37	(0.6) %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	2.4 %	(34.3) %
Gold(INR/10g)	50,325	0.0 %	29.1 %
Gold Comex(USD/oz)	1,886	(0.5) %	22.3 %
SILVER(INR/1Kg)	59,539	(0.3) %	29.3 %
Aluminium(USD/MT)	1,737	(0.5) %	(2.0) %
Copper(USD/MT)	6,610	1.0 %	7.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	0.0 %	(1.2) %

Global Economy: The US National Association of Realtors (NAR) said pending home sales in the US jumped to a record high in the month of August. NAR said its pending home sales index spiked by 8.8% to 132.8 in August after surging up by 5.9% to 122.1 in July. The payroll processor ADP said private sector employment spiked by 749,000 jobs in September after jumping by an upwardly revised 481,000 jobs in August. The US gross domestic product fell at a rate of 31.4% in the April-June quarter, only slightly changed from the 31.7% drop estimated one month ago, the Commerce Department reported Wednesday. China manufacturing sector continued to expand in September, with a manufacturing purchasing manager's index score of 51.5, the latest survey from the National Bureau of Statistics showed on Wednesday. That is up from 51.0 in August. It also moved further above the boom-or-bust line of 50 that separates expansion from contraction. The bureau also said its non-manufacturing PMI came in with a score of 55.9, up from 55.2 in the previous month. The UK economy contracted at a record pace in the second quarter though the decline was less severe than previously estimated, revised data from the Office for National Statistics showed Wednesday. The gross domestic product slipped 19.8% sequentially, revising from a 20.4% fall estimated initially. This was the largest quarterly contraction since quarterly records began in 1955. On a yearly basis, GDP was down 21.5% in the second quarter, which was revised from -21.7%. The data showed that GDP fell by a cumulative 21.8% in the first half of 2020. Japan industrial production climbed a seasonally adjusted 1.7% on month in August, the ministry of Economy, Trade and Industry said on Wednesday, following the 8.7% gain in July. On a yearly basis, industrial production dropped 13.3% following the 15.5% decline in the previous month.

Global Equities: US stocks jumped on stimulus hopes. US investors were largely indifferent to the first presidential debate.

Indian Economy: The Reserve Bank released its quarterly house price index (HPI) (base: 2010-11=100) for Q1:2020-21. The all-India HPI increased by 1.2% on a sequential basis (q-o-q) during Q1:2020-21; house prices in Bengaluru, Kochi, Ahmedabad and Lucknow increased during the quarter. On an annual basis (y-o-y), the all-India HPI increased by 2.8% in Q1:2020-21 as compared with 3.4% a year ago. The Ministry of Home Affairs (MHA), on September 30, announced the Unlock 5.0 guidelines, further relaxing curbs on activities outside of containment zones. In a key announcement, cinemas, theatres, and multiplexes will be allowed to operate with up to 50% of their seating capacity. Business to Business (B2B) exhibitions will now be permitted to open. Swimming pools being used for training of sportspersons, entertainment parks and similar places will be permitted to open too.

Equity Markets: Key equity indices ended with small gains after a volatile trading session. Firmness in FMCG shares outpaced selling in metal shares. Global cues were mixed as a chaotic first US presidential debate dented sentiment.

Corporate News: The Punjab National Bank (PNB) on Wednesday reported a borrowal fraud of Rs 1,203.26 crore in the non-performing assets (NPA) account of Sintex Industries Ltd. (SIL). Chemcon Speciality Chemicals and Computer Age Management Services are set to list shares today. Lupin will be watched after the company said it launched cancer drug Lapatinib tablets in the US.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(144.3)	(34.8)	86.8
MF(INR cr)	(44.9)	(233.7)	(196.9)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	51,853	56,529	55,854
F&O(INR cr)	2,249,492	2,157,024	1,704,357

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.4	27.8	30.2
NSE VIX	19.5	21.1	29.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,452	0.2 %	17.8 %	Energy	15,027	(1.0) %	39.5 %
IT	19,951	0.6 %	65.6 %	Pharma	11,773	0.5 %	67.5 %
Metals	2,243	(1.7) %	44.4 %	Finance	10,622	0.6 %	18.8 %
Auto	7,908	(0.2) %	69.8 %	PSU	1,277	(1.0) %	(0.4) %
FMCG	29,842	1.4 %	13.2 %	Real Estate	212	(0.6) %	23.1 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
ICICI Lomb	1,300	3.9 %	17.5 %	B P C L	353	(8.7) %	16.5 %
Adani Gree	738	3.3 %	382.4 %	Bharti Air	421	(3.4) %	(0.1) %
Avenue Sup	2,203	3.3 %	5.8 %	Adani Tran	242	(3.0) %	27.7 %
Torrent Ph	2,800	3.3 %	42.9 %	Tata Steel	360	(2.8) %	35.1 %
Grasim Ind	744	3.2 %	56.3 %	Container	365	(2.7) %	14.9 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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