



03 Nov.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,669	0.2 %	41.4 %
BSE SENSEX	39,758	0.4 %	40.7 %
CNX BANK	24,893	4.1 %	36.7 %
CNX MIDCAP	17,135	0.4 %	49.4 %
CNX SMALLCAP	5,729	(1.6) %	61.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,502	(0.6) %	(7.1) %
S&P 500	3,270	(1.2) %	1.2 %
FTSE 100	5,655	1.4 %	(25.6) %
HANG SENG	24,460	1.5 %	(14.3) %
NIKKEI	23,295	1.4 %	0.4 %
SHANGHAI COMPOSITE	3,225	0.0 %	4.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.16	0.4 %	4.2 %
EUR/USD	1.17	(0.4) %	4.4 %
GBP/USD	1.30	(0.3) %	(1.7) %
USD/JPY	104.45	0.1 %	(3.9) %
USD/AUD	1.42	0.7 %	(0.4) %
USD/SGD	1.37	0.2 %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	36	(1.1) %	(41.5) %
Gold(INR/10g)	50,890	0.5 %	30.5 %
Gold Comex(USD/oz)	1,871	0.0 %	21.3 %
SILVER(INR/1Kg)	61,711	2.1 %	34.0 %
Aluminium(USD/MT)	1,821	1.9 %	2.7 %
Copper(USD/MT)	6,695	0.0 %	8.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.9	0.0 %	(1.1) %

Global Economy: The ISM said it's US purchasing managers index (PMI) climbed to 59.3 in October from 55.4 in September, with a reading above 50 indicating growth in manufacturing activity. The US construction spending rose by 0.3 percent to an annual rate of \$1.414 trillion in September after climbing by 0.8 percent to \$1.410 trillion in August. China manufacturing sector continued to expand in October with a manufacturing PMI score of 53.6, the latest survey from Caixin revealed on Monday. That's up from 53.0 in September and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. IHS Markit Eurozone manufacturing PMI rose to 54.8 in October from 53.7 in September. The flash score was 54.4. German economy is set to contract in the fourth quarter as the government decided to restrict activity to curb the second wave of infections, the DIW institute said Monday. Gross domestic product is forecast to shrink 1% in the fourth quarter after rebounding 8.2 percent in the third quarter. The IHS Markit/Chartered Institute of Procurement & Supply factory PMI for UK fell to 53.7 in October from 54.1 in the previous month.

Global Equities: US markets stayed supported amid heavy volatility ahead of the Presidential Election.

Indian Economy: Manufacturing sector conditions in India continued to improve in October, with companies raising output to the greatest extent in 13 years amid robust sales growth. While firms purchased additional inputs for use in the production process, payroll numbers were lowered due to government guidelines related to the coronavirus disease 2019 (COVID-19). Inflationary pressures, meanwhile, remained subdued as seen by a modest increase in input costs and only marginal rise in selling prices. Rising from 56.8 in September to 58.9 in October, the headline seasonally adjusted IHS Markit India Manufacturing Purchasing Managers' Index (PMI) pointed to the strongest improvement in the health of the sector in over a decade.

Equity Markets: The trading was steeply volatile as investors braced themselves for the U.S. presidential election on Tuesday. After opening higher, the Nifty declined and hit the day's low of 11,557.40 in morning trade. The index hovered in the red till the afternoon session. It bounced back sharply in mid-afternoon and hit the day's high of 11,725.65.

Corporate News: Reliance Industries plans to start the delayed production from the second wave of discoveries in its eastern offshore KG-D6 block in November/December, the company said in an investor presentation. Tata Motors recorded higher domestic sales at 49,669 units in October against 39,152 units YoY. FMCG players will be in focus as the government has allowed companies to use by March next year inventories of packaging material or wrappers with manufacturing dates already printed, which is a big relief for the FMCG sector which suffered during the lockdowns.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(118.2)	128.9	91.8
MF(INR cr)	52.1	(831.6)	(274.1)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	57,960	57,960	55,776
F&O(INR cr)	1,503,832	1,503,832	1,835,579

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	36.9	29.5	30.1
NSE VIX	25.2	25.2	28.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,893	4.1 %	36.7 %	Energy	14,606	(2.5) %	35.6 %
IT	20,732	(0.9) %	72.1 %	Pharma	11,175	(0.6) %	59.0 %
Metals	2,339	(0.2) %	50.6 %	Finance	12,089	3.9 %	35.2 %
Auto	7,732	(0.3) %	66.0 %	PSU	1,303	3.4 %	1.5 %
FMCG	29,441	0.0 %	11.7 %	Real Estate	235	3.2 %	36.8 %

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>
Bank of Ba	45	7.6 %	(12.5) %	Reliance I	1,877	(8.6) %	75.4 %
Havells In	782	7.4 %	61.3 %	Divi's Lab	3,049	(3.0) %	62.4 %
IndusInd B	628	7.3 %	83.6 %	Eicher Mot	2,030	(2.7) %	56.1 %
ICICI Bank	417	6.3 %	34.2 %	Bharti Inf	181	(2.6) %	16.5 %
Axis Bank	523	6.1 %	45.7 %	HCL Techno	822	(2.3) %	98.9 %

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					

..... End of Report