



04 Nov.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,814	1.2 %	43.1 %
BSE SENSEX	40,261	1.3 %	42.4 %
CNX BANK	25,683	3.2 %	41.0 %
CNX MIDCAP	17,255	0.7 %	50.4 %
CNX SMALLCAP	5,733	0.1 %	61.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,480	2.1 %	(3.7) %
S&P 500	3,369	1.8 %	4.3 %
FTSE 100	5,787	2.3 %	(23.9) %
HANG SENG	24,940	2.0 %	(12.6) %
NIKKEI	23,295	1.4 %	0.4 %
SHANGHAI COMPOSITE	3,271	1.4 %	6.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.34	0.3 %	4.4 %
EUR/USD	1.16	(0.6) %	3.8 %
GBP/USD	1.29	(0.1) %	(1.8) %
USD/JPY	104.67	0.2 %	(3.7) %
USD/AUD	1.42	0.2 %	(0.2) %
USD/SGD	1.37	0.1 %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	2.8 %	(39.8) %
Gold(INR/10g)	51,068	0.3 %	31.0 %
Gold Comex(USD/oz)	1,871	0.0 %	21.3 %
SILVER(INR/1Kg)	62,171	0.7 %	35.0 %
Aluminium(USD/MT)	1,835	0.8 %	3.5 %
Copper(USD/MT)	6,713	0.3 %	8.9 %

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: New orders for US manufactured goods surged in the month of September, according to a report released by the Commerce Department on Tuesday. The Commerce Department said factory orders jumped by 1.1% in September after rising by a revised 0.6% in August. The Reserve Bank of Australia policy board headed by the governor Philip Lowe decided to lower its key rate by 15 basis points to a record low of 0.10%. The bank also decided to cut the target for the yield on the 3-year Australian Government bond to around 0.1% and to purchase A\$100 billion government bonds of maturities of around 5 to 10 years over the next six months. RBA said it will reduce the interest rate on new drawings under the Term Funding Facility to 0.1% and cut the interest rate on Exchange Settlement balances to zero. The bank said today's decision will assist the recovery by lowering financing costs for borrowers; contributing to a lower exchange rate than otherwise; and supporting asset prices and balance sheets. Malaysia's central bank maintained its key rate on Tuesday as policymakers said the current stance to be appropriate and accommodative. The Monetary Policy Committee of Bank Negara Malaysia decided to retain the overnight policy rate at 1.75%.

Global Equities: US stocks added further to gains as sentiments remained well supported on the Presidential Election day.

Indian Economy: India's merchandise exports in October 2020 were USD 24.82 billion, as compared to USD 26.23 billion in October 2019, showing a fall of 5.4%. Exports during April-October 2020-21 were USD 150.07 billion, exhibiting a decline of 19.05% over the same period last year. The value of India's merchandise imports in October 2020 was USD 33.6 billion, as compared to USD 37.99 billion in October 2019, a decline of 11.56%. Merchandise imports during April-October 2020-21 were USD 182.29 billion, as compared to USD 286.07 billion during the same period last year, exhibiting a negative growth of 36.28%. India was thus a net importer in October 2020, with a trade deficit of USD 8.78 billion, as compared to trade deficit of USD 11.76 billion, marking an improvement by 25.34%.

Equity Markets: The barometer index, the S&P BSE Sensex, jumped 503.55 points or 1.27% to 40,261.13. The Nifty 50 index added 144.35 points or 1.24% to 11,813.50. The broader market lagged the key benchmarks. The BSE Mid-Cap index rose 0.42% and the BSE Small-Cap index gained 0.35%.

Corporate News: Dr Reddy's Laboratories has won approval to conduct phase-3 clinical trials of a potential cancer drug that showed efficacy in Covid-19 patients during phase-2 trials. The Indian media and entertainment (M&E) industry's long-term outlook remains robust. As per PwC's Entertainment & Media Outlook 2020-2024, the Indian M&E industry is expected to grow at 10.1% CAGR to reach \$55 billion by 2024. State Bank of India, Lupin, HPCL, Adani Enterprises, BASF India, Jubilant Life Sciences, Jyothy Labs etc will be in focus ahead of latest earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	115.2	115.2	91.5
MF(INR cr)	(51.6)	(51.6)	(259.0)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	60,745	59,352	55,810
F&O(INR cr)	1,508,266	1,506,049	1,833,368

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	36.9	0	30.2
NSE VIX	24.2	24.7	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	25,683	3.2 %	41.0 %	Energy	14,528	(0.5) %	34.9 %
IT	20,736	0.0 %	72.1 %	Pharma	11,361	1.7 %	61.7 %
Metals	2,391	2.2 %	53.9 %	Finance	12,468	3.1 %	39.4 %
Auto	7,849	1.5 %	68.5 %	PSU	1,326	1.7 %	3.3 %
FMCG	29,526	0.3 %	12.0 %	Real Estate	230	(2.3) %	33.6 %

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>
Cadila Hea	438	6.6 %	65.9 %	UPL	417	(6.4) %	36.4 %
ICICI Bank	444	6.3 %	42.6 %	Muthoot Fi	1,190	(3.9) %	96.9 %
Hindalco I	180	5.3 %	96.1 %	NTPC	86	(3.6) %	6.1 %
Hindustan	212	4.7 %	32.4 %	Adani Gree	830	(3.4) %	443.1 %
Interglobe	1,370	4.5 %	37.2 %	Reliance I	1,850	(1.4) %	72.9 %

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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