



05 Oct.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,417	1.5 %	38.3 %
BSE SENSEX	38,697	1.7 %	36.9 %
CNX BANK	22,246	3.7 %	22.2 %
CNX MIDCAP	17,125	0.8 %	49.3 %
CNX SMALLCAP	5,861	0.7 %	65.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,683	(0.5) %	(3.0) %
S&P 500	3,348	(1.0) %	3.6 %
FTSE 100	5,902	0.4 %	(22.4) %
HANG SENG	23,459	0.8 %	(17.8) %
NIKKEI	23,030	(0.7) %	(0.8) %
SHANGHAI COMPOSITE	3,218	(0.2) %	4.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.57	(0.2) %	3.3 %
EUR/USD	1.17	0.2 %	4.5 %
GBP/USD	1.29	0.1 %	(2.4) %
USD/JPY	105.59	(0.0) %	(2.8) %
USD/AUD	1.40	(0.4) %	(1.8) %
USD/SGD	1.37	(0.2) %	1.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	(7.9) %	(39.4) %
Gold(INR/10g)	50,249	(0.2) %	28.9 %
Gold Comex(USD/oz)	1,913	1.4 %	24.0 %
SILVER(INR/1Kg)	58,910	(1.1) %	27.9 %
Aluminium(USD/MT)	1,705	(1.8) %	(3.8) %
Copper(USD/MT)	6,410	(3.0) %	4.0 %

**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 job growth eased in September, according to a closely watched report released by the Labor Department on Friday. The non-farm payroll employment rose by 661,000 jobs in September after spiking by an upwardly revised 1.489 million jobs in August. However, the unemployment rate fell to 7.9% in September from 8.4% in August. The drop in the unemployment rate came as the labor force shrank by 695,000 persons. Revised data released by the University of Michigan on Friday showed consumer sentiment in the US improve by more than previously estimated in the month of September. The report said the consumer sentiment index for September was upwardly revised to 80.4 from the preliminary reading of 78.9. Eurozone consumer prices declined for the second straight month in September adding pressure on the European Central Bank to add stimulus and kick start the economy from the coronavirus driven downturn. Consumer prices decreased 0.3% on a yearly basis, following a 0.2% drop in August, flash data from Eurostat showed Friday. A similar lower rate was last seen in April 2016.

**Global Equities:** The US stocks slumped with NASDAQ tanking more than 2% as US President Donald Trump and First Lady Melania Trump have tested positive for the coronavirus.

**Indian Economy:** The Confederation of Indian Industry (CII) said that a steady recovery of the Indian economy is on the anvil as corporate India restarts business and economic activity with lockdowns being increasingly relaxed in many parts of the country. India Inc is now estimating a capacity utilisation of more than 50% in the second half of this financial year, it added.

**Equity Markets:** Key domestic indices ended with stellar gains on Thursday, extending gains for the second day. Positive global cues, better-than-expected domestic macro numbers and decent auto sales in September 2020 supported buying. The risk appetite also improved as the central government yesterday issued new guidelines for opening up of more activities in areas outside the containment zones.

**Corporate News:** Financial stocks will be in focus. The finance ministry said the government has decided to maintain its tradition of handholding small borrowers and bear the burden arising from such waiver of interest on interest, or compound interest, for the banks. Reliance Industries said Mubadala Investment Company, GIC and TPG will invest Rs 13,597.5 crore into RIL's subsidiary Reliance Retail Ventures. Tata Motors sold 44,444 vehicles in September 2020 against 32,376 vehicles sold in September 2019, sales in Q2 increasing 13% to 1,06,888 vehicles. Prime Minister Narendra Modi on Saturday said the textile sector is key in realising a self-reliant India, and added that his government is particularly focussing on skills upgradation, financial assistance and integrating the sector with latest technology.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(35.9)	(34.9)	85.8
MF(INR cr)	347.3	(202.1)	(191.8)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	50,948	50,948	55,815
F&O(INR cr)	4,243,193	4,243,193	1,724,507

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.6	27.6	30.2
NSE VIX	18.4	18.4	29.1

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,246	3.7 %	22.2 %	Energy	15,050	0.2 %	39.7 %
IT	20,110	0.8 %	66.9 %	Pharma	11,823	0.4 %	68.3 %
Metals	2,261	0.8 %	45.6 %	Finance	10,950	3.1 %	22.4 %
Auto	7,966	0.7 %	71.0 %	PSU	1,292	1.2 %	0.7 %
FMCG	30,010	0.6 %	13.9 %	Real Estate	216	1.8 %	25.3 %

### 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>
IndusInd B	592	12.3 %	73.0 %	H P C L	176	(2.9) %	(4.6) %
Bajaj Fina	3,443	5.0 %	55.1 %	Container	356	(2.4) %	12.2 %
Bandhan Ba	286	4.7 %	46.6 %	Punjab Nat	28	(1.9) %	(8.0) %
Axis Bank	444	4.5 %	23.7 %	Havells In	666	(1.7) %	37.4 %
ICICI Bank	369	4.1 %	18.7 %	Dr Reddy's	5,112	(1.5) %	65.2 %

### EVENTS CALENDAR

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

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