



05 Nov.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,909	0.8 %	44.3 %
BSE SENSEX	40,616	0.9 %	43.7 %
CNX BANK	25,772	0.3 %	41.5 %
CNX MIDCAP	17,367	0.6 %	51.4 %
CNX SMALLCAP	5,726	(0.1) %	61.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,848	1.3 %	(2.4) %
S&P 500	3,443	2.2 %	6.6 %
FTSE 100	5,883	1.7 %	(22.6) %
HANG SENG	24,886	(0.2) %	(12.8) %
NIKKEI	23,695	1.7 %	2.1 %
SHANGHAI COMPOSITE	3,277	0.2 %	6.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.39	0.1 %	4.5 %
EUR/USD	1.17	0.4 %	4.2 %
GBP/USD	1.30	0.3 %	(1.5) %
USD/JPY	104.65	(0.0) %	(3.7) %
USD/AUD	1.41	(1.2) %	(1.4) %
USD/SGD	1.36	(0.3) %	1.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	2.8 %	(39.8) %
Gold(INR/10g)	51,069	0.0 %	31.0 %
Gold Comex(USD/oz)	1,871	0.0 %	21.3 %
SILVER(INR/1Kg)	61,208	(1.5) %	32.9 %
Aluminium(USD/MT)	1,891	3.1 %	6.7 %
Copper(USD/MT)	6,792	1.2 %	10.2 %

FIXED INCOME

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

Global Economy: Growth in US service sector activity slowed in the month of October, according to a report released by the Institute for Supply Management (ISM) on Wednesday. The ISM said its services PMI dipped to 56.6 in October from 57.8 in September, although a reading above 50 still indicates growth in the service sector. The Commerce Department said the trade deficit narrowed to \$63.9 billion in September from a revised \$67.0 billion in August. ADP said US private sector employment rose by 365,000 jobs in October after spiking by an upwardly revised 753,000 jobs in September. China services sector continued to expand in October with services PMI score of 56.8, the latest survey from Caixin revealed on Wednesday. That was up from 54.8 in September. The pace of Euro area private sector growth in October as the containment measures were reintroduced to combat the second wave of Covid-19 infections, final survey results from IHS Markit showed Wednesday. The composite output index fell to 50.0 in October from 50.4 in September. The flash score was 49.4. A score above 50 indicates expansion, while a reading below 50 suggests contraction. Manufacturing output grew the most in over two-and-a-half years. In stark contrast, service sector activity contracted at the fastest pace since May. The services Purchasing Managers' Index dropped to 46.9 in October from 48.0 in September. The score was revised from 46.2. IHS Markit/CIPS UK services purchasing managers' index (PMI) registered 51.4 points in October, holding above the 50.0 no-change mark but down sharply from 56.1 in September.

Global Equities: US stocks held onto massive gains as traders watched election results.

Indian Economy: India's service sector activity saw expansion for the first time since February in October, survey results from IHS Markit showed Tuesday. The IHS Markit services Purchasing Managers' Index rose to 54.1 in October from 49.8 in September. New work increased in October, while new orders from abroad dropped further. Employment continued to decline in October though. The 12-month outlook for business activity remained positive. India's composite output index, which combines services and manufacturing output, rose to 58.0 in October from 54.6 in the previous month. This was the highest in nearly nine years.

Equity Markets: Domestic equity benchmarks ended near the day's high after a volatile session on Wednesday. The Nifty managed to close above the 11,900 mark. Pharma and IT shares climbed while realty and metal shares declined. Trading was choppy amid a tight US presidential race that may not be decided right away.

Corporate News: Adani Enterprises plans to spend about Rs 50,000 crore in capital expenditure over the next five years with a major chunk of it going towards airports business, media reports noted. Pidilite Industries company reported consolidated profit at Rs 356.4 crore in Q2FY21 against Rs 325 crore, revenue rose to Rs 1,880.3 crore from Rs 1,806.6 crore YoY. Godrej Agrovet reported higher consolidated profit at Rs 115.5 crore in Q2FY21 against Rs 102.6 crore, revenue declined to Rs 1,723.9 crore from Rs 1,851.1 crore YoY. IT counters could be in focus. Indian Rupee tanked as global markets saw choppy moves. INR closed at 74.76 per US dollar, sliding 35 paise on the day. INR tested near three month low of 74.90 in intraday moves against the dollar.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	207.6	161.4	92.3
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)	60,982	59,895	55,845
F&O(INR cr)	2,497,876	1,836,658	1,837,827

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	36.9	0	30.2
NSE VIX	23.2	24.2	28.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,772	0.3 %	41.5 %	Energy	14,629	0.7 %	35.8 %
IT	21,105	1.8 %	75.2 %	Pharma	11,609	2.2 %	65.2 %
Metals	2,384	(0.3) %	53.4 %	Finance	12,458	(0.1) %	39.3 %
Auto	7,902	0.7 %	69.7 %	PSU	1,329	0.3 %	3.6 %
FMCG	29,612	0.3 %	12.3 %	Real Estate	226	(1.8) %	31.1 %

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>
IndusInd B	678	4.9 %	98.1 %	UPL	401	(3.8) %	31.3 %
Sun Pharma	505	3.9 %	46.9 %	Muthoot Fi	1,157	(2.8) %	91.5 %
Avenue Sup	2,291	3.7 %	10.0 %	Interglobe	1,341	(2.1) %	34.3 %
L & T Info	3,039	3.5 %	118.3 %	H D F C	2,088	(2.0) %	31.9 %
Divi's Lab	3,196	3.4 %	70.3 %	Bharti Inf	178	(1.9) %	14.8 %

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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