



06 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,503	0.0 %	39.4 %
BSE SENSEX	38,974	0.7 %	37.9 %
CNX BANK	22,371	0.0 %	22.9 %
CNX MIDCAP	17,108	0.0 %	49.1 %
CNX SMALLCAP	5,896	0.0 %	66.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,149	1.7 %	(1.4) %
S&P 500	3,409	1.8 %	5.5 %
FTSE 100	5,943	0.7 %	(21.8) %
HANG SENG	23,768	1.3 %	(16.7) %
NIKKEI	23,312	1.2 %	0.5 %
SHANGHAI COMPOSITE	3,218	(0.2) %	4.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.12	(0.8) %	2.7 %
EUR/USD	1.17	0.1 %	4.5 %
GBP/USD	1.29	0.5 %	(2.0) %
USD/JPY	105.37	(0.2) %	(3.0) %
USD/AUD	1.40	(0.6) %	(2.0) %
USD/SGD	1.36	(0.4) %	1.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	(7.9) %	(39.4) %
Gold(INR/10g)	50,418	0.3 %	29.3 %
Gold Comex(USD/oz)	1,913	1.4 %	24.0 %
SILVER(INR/1Kg)	60,009	1.9 %	30.3 %
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: Activity in the US service sector unexpectedly grew at a faster rate in the month of September, according to a report released by the Institute for Supply Management on Monday. The ISM said its services PMI rose edged up to 57.8 in September from 56.9 in August, with a reading above 50 indicating growth in the service sector. Eurozone composite output index fell to a three-month low of 50.4 in September from 51.9 in the previous month final survey data from IHS Markit showed Tuesday. Amid rising coronavirus infections, the euro area private sector expanded only marginally in September as the service sector slipped back into contraction, while manufacturing output grew the most in over two-and-a-half years. The services Purchasing Managers' Index came in at 48.0, down from 50.5 in August but above the flash score of 47.6. Japan services sector continued to contract in September, with a seasonally adjusted services PMI score of 46.6, the latest survey from Jibun Bank showed on Monday. That's up from 45.0 in August, although it remains beneath the boom-or-bust line of 50 that separates expansion from contraction. Sentiment hit its highest level in nine months. The data also showed that the composite index rose to 46.6 in September from 45.2 in August.

Global Equities: US stocks saw impressive surge as positive reports about President Donald Trump's health boosted the sentiments.

Indian Economy: The Goods and Services Tax (GST) collection rose to Rs 95,480 crore in September, marking the highest level since the beginning of the lockdown. The latest reading also saw a 4% jump compared to the corresponding month last year. The Goods and Services Tax (GST) Council was deadlocked on the issue of compensation to be paid to states on account of the shortfall stemming from the transition to the levy in 2017. It however decided to extend the compensation cess beyond 2022—the five-year period that had been agreed originally.

Equity Markets: Key domestic indices ended with stellar gains on Monday, continuing their uptrend for third consecutive session. Positive global cues and decent Q2 business update from domestic companies supported buying.

Corporate News: The Indian economy may be slowly returning to strength with the month of September marking the strongest turnaround since the pandemic broke out, HDFC, India's largest mortgage lender indicated on Monday. The lender added that business levels had surpassed those done same time last year. Escorts completed the acquisition of 2 crore equity shares of KAI from KBT, constituting 40% of the share capital of KAI at Rs 45 per share for an aggregate value of Rs 90 crore. Tata Motors said subsidiary JLR retail sales rose 50% to 1,13,569 vehicles in Q2FY21, against 74,067 vehicles in Q1FY21, but down 11.9% YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	253.7	253.7	87.2
MF(INR cr)	132.1	132.1	(185.1)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	54,369	52,658	55,803
F&O(INR cr)	1,562,325	2,902,759	1,723,230

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.6	27.6	30.2
NSE VIX	19.7	19.0	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	22,371	0.6 %	22.9 %	Energy	14,999	(0.3) %	39.2 %
IT	20,809	3.5 %	72.7 %	Pharma	12,024	1.7 %	71.1 %
Metals	2,319	2.5 %	49.3 %	Finance	10,963	0.1 %	22.6 %
Auto	7,958	(0.1) %	70.9 %	PSU	1,290	(0.1) %	0.6 %
FMCG	30,112	0.3 %	14.2 %	Real Estate	216	0.3 %	25.7 %

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>
TCS	2,706	7.2 %	58.3 %	ICICI Lomb	1,254	(3.6) %	13.4 %
Wipro	334	6.7 %	76.2 %	Avenue Sup	2,110	(3.4) %	1.3 %
Tata Steel	382	4.8 %	43.5 %	Info Edg.(3,488	(3.4) %	73.2 %
Marico	377	4.1 %	42.0 %	Indraprast	390	(2.9) %	(0.3) %
Adani Tran	257	4.1 %	35.9 %	Bajaj Fins	5,881	(2.8) %	30.6 %

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