



09 Oct.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|--------|
| CNX NIFTY | 11,852 | 0.1 % | 43.6 % |
| BSE SENSEX | 40,183 | 0.8 % | 42.3 % |
| CNX BANK | 23,313 | 0.5 % | 28.0 % |
| CNX MIDCAP | 17,183 | 0.2 % | 49.8 % |
| CNX SMALLCAP | 5,907 | 0.3 % | 66.8 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 28,426 | 0.4 % | (0.4) % |
| S&P 500 | 3,447 | 0.8 % | 6.7 % |
| FTSE 100 | 5,978 | 0.5 % | (21.4) % |
| HANG SENG | 24,193 | (0.2) % | (15.2) % |
| NIKKEI | 23,647 | 1.0 % | 1.9 % |
| SHANGHAI COMPOSITE | 3,218 | (0.2) % | 4.3 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 73.28 | 0.3 % | 2.9 % |
| EUR/USD | 1.18 | (0.0) % | 4.8 % |
| GBP/USD | 1.29 | (0.5) % | (2.2) % |
| USD/JPY | 105.90 | 0.2 % | (2.5) % |
| USD/AUD | 1.40 | 0.7 % | (1.7) % |
| USD/SGD | 1.36 | (0.1) % | 1.0 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|-------|----------|
| WTI Crude(USD/bbl) | 41 | 3.1 % | (32.7) % |
| Gold(INR/10g) | 50,180 | 0.2 % | 28.7 % |
| Gold Comex(USD/oz) | 1,893 | 0.2 % | 22.7 % |
| SILVER(INR/1Kg) | 60,016 | 2.3 % | 30.3 % |
| Aluminium(USD/MT) | 1,786 | 2.3 % | 0.8 % |
| Copper(USD/MT) | 6,612 | 1.3 % | 7.2 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 0.8 | 0.0 % | (1.1) % |

Global Economy: A report released by the Labor Department on Thursday showed a modest decrease in first-time claims for U.S. unemployment benefits in the week ended October 3rd. The Labor Department said initial jobless claims edged down to 840,000, a decrease of 9,000 from the previous week's revised level of 849,000. Germany's exports were up 2.4% in August from 4.7% in July, data from Destatis revealed Thursday. Meanwhile, the month-on-month increase in imports accelerated to 5.8 percent from 1.1%. As a result, the trade surplus fell to a seasonally adjusted EUR 15.7 billion from EUR 18 billion in July. On a yearly basis, exports were down 10.2%, following an 11% decrease in July. At the same time, imports dropped 7.9% versus an 11.3% fall in the previous month. The trade surplus decreased to an unadjusted EUR 12.8 billion from EUR 16.4 billion in the same period last year. Japan posted a current account surplus of 2,102.8 billion yen in August, down 1.5% on year, the Ministry of Finance said on Thursday, following the 1,468.3 billion yen surplus in July. Exports were down 15.5% on year at 5.124 trillion yen, while imports sank an annual 22% to 4.711 trillion yen. The trade surplus was 413 billion yen, up from 137.3 billion yen in the previous month. The capital account saw a deficit of 9.3 billion yen and the financial account had a surplus of 560.0 billion yen. A measure of the public assessment of the Japanese economy continued to gain in September, survey data from the Cabinet Office showed on Thursday. The current conditions index of the Economy Watchers' Survey, which measures the current situation of the economy, increased notably to 49.3 in September from 43.9 in August. The outlook index that signals future activity moved to 48.3 in September from 42.4 in the previous month, rising for a second month.

Global Equities: Steady gains emerged in the US stocks on continued optimism about fresh coronavirus stimulus bill.

Indian Economy: Federation of Automobiles Dealers Association or FADA said that total vehicle registrations in September 2020 declined 10.24% to 13,44,866 from 14,98,283 in September 2019. Two-wheeler vehicle registrations were at 10,16,977 vehicles (down 12.62% YoY), three-wheeler vehicle registrations were at 24,060 vehicles (down 58.86% YoY) and the registrations of commercial vehicles stood at 39,600 vehicles (down 33.65% YoY) in September 2020. However, passenger vehicle retail sales rose 9.81% year-on-year (YoY) to 1,95,665 units in September 2020 from 1,78,189 units in September 2019. Tractor registrations also surged 80.39% to 68,564 units in September 2020 from 38,008 units in September 2019. Vinkesh Gulati, FADA president stated that with the Government's persistent effort to unlock India, the month of September continued to witness Automobile Registrations on a rise as compared to previous months.

Equity Markets: Benchmark indices advanced for the sixth trading session on Thursday amid positive global cues. Firmness in IT and banks shares supported the uptrend. The Nifty faced stiff resistance at 11,900 mark, but managed to settle above 11,800. The trading was volatile due to expiry of weekly index options. The barometer index, the S&P BSE Sensex, jumped 303.72 points or 0.76% at 40,182.67. The Nifty 50 index rallied 95.75 points or 0.82% at 11,834.60.

Corporate News: State-owned NTPC Ltd has incorporated a wholly-owned subsidiary, in the name of NTPC Renewable Energy Ltd with the Registrar of Companies, NCT of Delhi & Haryana on October 7, 2020, to undertake renewable energy business. Adani Green Energy will be in focus as Fitch affirmed Adani Green Energy Restricted Group 2's notes at 'BBB-', and the outlook is Negative. The domestic air traffic market will touch 3,00,000 passengers a day, the pre-Covid level, between Diwali and the end of the year, Hardeep Puri, Minister of State, Civil Aviation said on Thursday.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 139.0 | 146.0 | 87.7 |
| MF(INR cr) | (1,106.2) | (810.4) | (207.1) |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 64,576 | 55,737 | 55,850 |
| F&O(INR cr) | 4,609,853 | 2,882,746 | 1,749,680 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 26.4 | 27.9 | 30.1 |
| NSE VIX | 20.4 | 19.6 | 28.8 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 23,191 | 1.0 % | 27.4 % | Energy | 14,780 | (0.9) % | 37.2 % |
| IT | 21,697 | 3.2 % | 80.1 % | Pharma | 12,209 | 2.5 % | 73.8 % |
| Metals | 2,272 | 0.2 % | 46.3 % | Finance | 11,434 | 0.8 % | 27.9 % |
| Auto | 8,184 | 0.2 % | 75.7 % | PSU | 1,293 | 0.7 % | 0.8 % |
| FMCG | 30,136 | (0.1) % | 14.3 % | Real Estate | 219 | 0.6 % | 27.3 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| L & T Info | 2,861 | 7.3 % | 105.5 % | Tata Consu | 488 | (3.3) % | 74.4 % |
| Wipro | 359 | 7.2 % | 89.7 % | GAIL (Indi) | 84 | (2.9) % | 11.1 % |
| Cadila Hea | 436 | 5.6 % | 65.3 % | O N G C | 68 | (2.9) % | 4.1 % |
| Cipla | 811 | 4.9 % | 96.1 % | Bosch | 12,842 | (2.9) % | 39.0 % |
| Biocon | 469 | 3.8 % | 68.5 % | Hindustan | 205 | (2.7) % | 27.8 % |

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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