



09 Nov.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,264	1.2 %	48.6 %
BSE SENSEX	41,893	1.3 %	48.2 %
CNX BANK	26,799	1.8 %	47.2 %
CNX MIDCAP	17,803	0.7 %	55.2 %
CNX SMALLCAP	5,859	0.6 %	65.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,323	(0.2) %	(0.8) %
S&P 500	3,509	(0.0) %	8.6 %
FTSE 100	5,910	0.1 %	(22.3) %
HANG SENG	25,713	0.1 %	(9.9) %
NIKKEI	24,325	0.9 %	4.8 %
SHANGHAI COMPOSITE	3,312	(0.2) %	7.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.99	(0.6) %	3.9 %
EUR/USD	1.18	0.8 %	5.1 %
GBP/USD	1.31	0.5 %	(1.0) %
USD/JPY	103.99	(0.6) %	(4.3) %
USD/AUD	1.38	(1.1) %	(2.9) %
USD/SGD	1.35	(0.6) %	0.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	(4.3) %	(39.3) %
Gold(INR/10g)	52,192	1.7 %	33.8 %
Gold Comex(USD/oz)	1,871	0.0 %	21.3 %
SILVER(INR/1Kg)	65,753	5.1 %	42.8 %
Aluminium(USD/MT)	1,892	0.3 %	6.7 %
Copper(USD/MT)	6,939	2.1 %	12.5 %

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: The US has chosen Democrat Joe Biden as its 46th president after a closely fought battle. Biden repeated his promise that he would seek to unify rather than divide. He pledged to govern by the creed that he does not see blue states and red states, but only the United States. The US Labor Department reported Friday that nonfarm payrolls increased by 638,000 and the unemployment rate was at 6.9% in October. While the unemployment rate was sharply lower than September's 7.9%, the headline nonfarm figure was less than September pace of 672,000. The jobless rate decline was positive as it came with a labor force participation rate that rose 0.3 percentage points to 61.7%. An alternative measure that includes discouraged workers and those holding part-time jobs for economic reasons also fell, to 12.1% from 12.8% a month ago. Germany's industrial production rose in September, data released by Destatis showed on Friday. Industrial output climbed 1.6% on month, following the 0.5% seen in August. Excluding energy and construction, production in industry was rose 2% in September. On a yearly basis, industrial production declined 7.3% in September. However, this was slower than the 8.7% drop in August. Japan household spending was down 10.2% on year in September, coming in at 269,863 yen the Ministry of Internal Affairs and Communications said on Friday, following the 6.9% drop in August. The average of monthly income per household stood at 469,235 yen, up 2.6% on year. Individually, spending on furniture, clothing, medical care and recreation all were down sharply. Australia services sector swung to expansion in October, the latest survey from the Australian Industry Group showed on Friday with a seasonally adjusted Performance of Service Index score of 51.4. That's up sharply from 36.2 in September and it moves above the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: US stocks ended slightly lower on Friday. The week saw large gains for the major indices with Dow soaring around 7%, the Nasdaq jumping by 9% and the S&P 500 spiking by around 7%.

Indian Economy: The Confederation of Indian Industry (CII) has written to the finance ministry, urging to explore an Emergency Loan Credit Guarantee Scheme to support the stressed sectors and argued that prolonged strain on employment-intensive sectors could impede economic recovery. The industry chamber has recommended this intervention to assist the stressed segments, primarily in the service sectors like hospitality, tourism aviation and retail, as this would not have any impact on the fiscal deficit this year but will provide the much needed liquidity to these sectors which employ a large number of people.

Equity Markets: Domestic equity benchmarks ended near the day's high on Friday. The Nifty managed to close above the 12,250 mark. The broader market lagged the benchmark indices. The S&P BSE Mid-Cap index rose 0.36%. The S&P BSE Small-Cap index gained 0.54%.

Corporate News: IT counters could see some selling pressure on surge in Indian Rupee. Indian Rupee rose for a second day and closed at 74.08 per US dollar, gaining 28 paise on the day. Ashok Leyland reported consolidated loss at Rs 146.7 crore in Q2FY21 against profit of Rs 38.9 crore, revenue fell to Rs 2,836.6 crore from Rs 3,929.5 crore YoY. State-run ONGC plans to hike output from its onshore mature fields through production enhancement contracts (PEC) with oil and gas companies. Bharat Electronics reported higher profit at Rs 397 crore in Q2FY21 compared to Rs 339 crore, revenue jumped to Rs 3,188.7 crore from Rs 2,742.7 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	727.5	268.2	96.1
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)	62,399	60,250	55,912
F&O(INR cr)	1,451,060	2,298,856	1,853,116

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.8	34.0	30.2
NSE VIX	20.5	22.8	27.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,799	1.8 %	47.2 %	Energy	15,181	1.1 %	40.9 %
IT	21,492	0.5 %	78.4 %	Pharma	11,623	(0.7) %	65.4 %
Metals	2,500	0.5 %	60.9 %	Finance	12,894	1.9 %	44.2 %
Auto	8,006	0.1 %	71.9 %	PSU	1,375	0.6 %	7.1 %
FMCG	30,151	(0.1) %	14.4 %	Real Estate	227	1.1 %	31.9 %

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>
Hindustan	225	4.3 %	40.0 %	Container	378	(7.2) %	19.1 %
Motherson	117	4.0 %	102.0 %	Ambuja Cem	248	(3.0) %	58.3 %
Bajaj Fins	6,286	3.8 %	39.6 %	ACC	1,654	(2.7) %	71.7 %
Reliance I	2,029	3.8 %	89.6 %	Maruti Suz	6,908	(2.6) %	62.7 %
IndusInd B	739	3.4 %	115.8 %	Adani Tran	292	(2.5) %	54.1 %

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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