



12 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,914	0.7 %	44.3 %
BSE SENSEX	40,509	0.8 %	43.3 %
CNX BANK	23,847	2.8 %	31.0 %
CNX MIDCAP	17,093	(0.3) %	49.0 %
CNX SMALLCAP	5,877	(0.2) %	66.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,587	0.6 %	0.2 %
S&P 500	3,477	0.9 %	7.6 %
FTSE 100	6,017	0.7 %	(20.9) %
HANG SENG	24,119	(0.3) %	(15.5) %
NIKKEI	23,620	(0.1) %	1.8 %
SHANGHAI COMPOSITE	3,272	1.7 %	6.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.18	(0.1) %	2.8 %
EUR/USD	1.18	0.0 %	4.9 %
GBP/USD	1.29	0.3 %	(1.9) %
USD/JPY	106.01	0.1 %	(2.4) %
USD/AUD	1.40	(0.4) %	(2.0) %
USD/SGD	1.36	(0.1) %	0.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(1.4) %	(33.6) %
Gold(INR/10g)	50,695	1.0 %	30.0 %
Gold Comex(USD/oz)	1,929	1.9 %	25.1 %
SILVER(INR/1Kg)	60,813	1.3 %	32.0 %
Aluminium(USD/MT)	1,806	1.1 %	1.9 %
Copper(USD/MT)	6,740	1.9 %	9.3 %

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: Wholesale inventories in the US rose by slightly less than anticipated in the month of August, according to a report released by the Commerce Department on Friday. The Commerce Department said wholesale inventories jumped by 0.4% in August after edging down by 0.2% in July. China's service sector registered a strong growth in business activity in September, signaling a further recovery from the coronavirus pandemic, survey data from IHS Markit showed Friday. The Caixin composite services Purchasing Managers' Index rose to 54.8 in September from 54.0 in August. This was the fifth consecutive increase in service sector output. The UK economy rose at a moderate pace in August as lockdown measures continued to ease, the Office for National Statistics said Friday. Gross domestic product jumped 2.1% on month, slower than the 6.4% expansion seen in July. This was the fourth consecutive monthly increase following a record fall of 19.5% in April. August GDP was 21.7% higher than its April 2020 low. In three months to August, GDP grew 8%, following two consecutive quarterly declines. The average of household spending in Japan was down 6.9% on year in August, the Ministry of Internal Affairs and Communications said on Friday - coming in at 276,360 yen. On a monthly basis, household spending was up 1.7% following the 6.5% drop in the previous month.

Global Equities: US stocks extended gains on continued optimism about a new stimulus bill. IT stocks soared.

Indian Economy: The Reserve Bank of India, in its latest Monetary Policy Statement decided to keep the policy repo rate under the liquidity adjustment facility (LAF) unchanged at 4%. Consequently, the reverse repo rate under the LAF remains unchanged at 3.35% and the marginal standing facility (MSF) rate and the Bank Rate at 4.25%. The Reserve Bank Governor Shaktikanta Das noted in a statement accompanying the monetary policy update today that the Indian economy is entering into a decisive phase in the fight against the pandemic. For the year 2020-21 as a whole, real GDP is expected to decline by 9.5%, with risks tilted to the downside. If, however, the current momentum of upturn gains ground, a faster and stronger rebound is eminently feasible.

Equity Markets: Domestic benchmark indices ended with modest gains on Friday, rising for the seventh consecutive session. The sentiment got a boost as the Reserve bank of India left key policy rates unchanged. Banks and financial stocks were in demand while pharma and FMCG shares declined.

Corporate News: Glenmark Pharma said the company's clinical study says no significant clinical benefit with Umifenovir addition in COVID-19 treatment. Wipro, GNA Axles and Shalby will announced quarterly earnings today. State-owned steel maker SAIL plans to commence commercial production of head hardened (HH) rails in this fiscal, media reports noted.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	167.3	150.2	88.3
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)	59,489	56,362	55,878
F&O(INR cr)	1,533,046	2,657,796	1,748,026

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.0	27.4	30.1
NSE VIX	20.4	19.8	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	23,847	2.8 %	31.0 %	Energy	14,834	0.4 %	37.7 %
IT	21,838	0.6 %	81.3 %	Pharma	12,044	(1.4) %	71.4 %
Metals	2,261	(0.5) %	45.5 %	Finance	11,648	1.9 %	30.3 %
Auto	8,164	(0.2) %	75.3 %	PSU	1,333	3.1 %	3.9 %
FMCG	29,924	(0.7) %	13.5 %	Real Estate	215	(1.6) %	25.2 %

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>
Wipro	374	4.0 %	97.4 %	Biocon	452	(3.7) %	62.3 %
Bank of Ba	44	4.0 %	(13.6) %	Tata Consu	471	(3.5) %	68.3 %
Punjab Nat	29	4.0 %	(5.1) %	Grasim Ind	745	(3.3) %	56.5 %
ICICI Bank	402	3.6 %	29.0 %	Hindalco I	170	(2.4) %	85.5 %
Axis Bank	468	3.6 %	30.5 %	UPL	497	(2.4) %	62.6 %

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					

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