



12 Nov.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,749	0.9 %	54.5 %
BSE SENSEX	43,594	0.7 %	54.2 %
CNX BANK	28,845	0.8 %	58.4 %
CNX MIDCAP	18,075	0.4 %	57.6 %
CNX SMALLCAP	5,917	0.7 %	67.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,398	(0.1) %	3.0 %
S&P 500	3,573	0.8 %	10.6 %
FTSE 100	6,382	1.4 %	(16.1) %
HANG SENG	26,227	(0.3) %	(8.1) %
NIKKEI	25,350	1.8 %	9.2 %
SHANGHAI COMPOSITE	3,342	(0.5) %	8.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.09	0.4 %	4.1 %
EUR/USD	1.18	(0.5) %	5.4 %
GBP/USD	1.32	0.6 %	0.3 %
USD/JPY	105.19	1.8 %	(3.2) %
USD/AUD	1.37	(0.3) %	(3.7) %
USD/SGD	1.35	(0.1) %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	44	8.2 %	(28.7) %
Gold(INR/10g)	50,530	0.2 %	29.6 %
Gold Comex(USD/oz)	1,871	0.0 %	21.3 %
SILVER(INR/1Kg)	62,256	1.0 %	35.2 %
Aluminium(USD/MT)	1,880	(1.7) %	6.1 %
Copper(USD/MT)	6,866	(2.4) %	11.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.0	0.1 %	(1.0) %

Global Economy: China's bank lending eased in October after rising in the previous two months, data from the People's Bank of China showed Wednesday. Banks provided CNY 689.8 billion in new loans in October versus CNY 1.89 billion in September. Total social financing, a broad measure of credit and liquidity in the economy, fell to CNY 1.42 trillion from CNY 3.48 trillion in September. The broad M2 money supply saw a double-digit annual growth of 10.5% at the end of October, slower than the 10.9% expansion in September. European Central Bank head Christine Lagarde stated that the current 1.35 trillion-euro bond purchase program and cheap loans to banks are likely to remain the main tools to help the economy as it prepares to offer more stimulus in December. The French jobless rate rose to a two-year high in the third quarter of 2020, data from the statistical office Insee showed Tuesday. The unemployment rate rose to 9% in the third quarter from 7.1% in the second quarter. This was the highest since the third quarter of 2018 and was 0.9 points higher than its pre-crisis level in the fourth quarter of 2019. Australia's consumer sentiment strengthened in November, survey results from Westpac showed Wednesday. The Westpac-Melbourne Institute Index of Consumer Sentiment rose 2.5% to 107.7 in November from 105.0 in the previous month. The indicator hit its highest level since November 2013.

Global Equities: Some fatigue was seen in DOW after the latest spurt though tech stocks soared yesterday.

Indian Economy: According to latest data released by the Society Of Indian Automobile Manufacturers (SIAM), the total production of Passenger Vehicles, Three-wheelers, Two-wheelers and Quadricycle in the month of October'20 was 2,830,153 units, as against 2,086,479 units in October'19, witnessing a growth of 35.64%. The total exports of Two-wheelers grew by 25.64% in October'20, as compared to October'19. A growth of 9.68% has been registered in the sales of Passenger Cars in October'20, as compared to October'19. However, three-wheelers saw a dip in sales by 60.91% in October'20, as compared to October'19. The Union Cabinet chaired by the Prime Minister, Narendra Modi has given its approval to introduce the Production-Linked Incentive (PLI) Scheme in the 10 key sectors for Enhancing India's Manufacturing Capabilities and Enhancing Exports - Atmanirbhar Bharat. RBI noted in a latest update the economy rebounded sharply from May/June 2020 with the reopening of the economy, with industry normalising faster than contact-intensive service sectors, pointing to a short-lived contraction.

Equity Market: Local stocks extended its winning run to eighth consecutive trading sessions and closed near record high levels on Wednesday. Pharma and auto shares rallied while PSU banks corrected. The Sensex hit a record high of 43,708.47 while the Nifty hit a record high of 12,769.75 in morning trade.

Corporate News: Aurobindo Pharma company reported a profit at Rs 805.6 crore in Q2FY21 compared to Rs 639.5 crore, revenue rose to Rs 6,483.3 crore from Rs 5,600.5 crore YoY. The government has allowed airlines to increase the total number of flights to up to 70% of the pre-COVID levels, increasing it from up to 60% allowed till date. Eicher Motors, Engineers India, Grasim Industries, HUDCO, Infibeam Avenues, IRCTC, IRB Infrastructure Developers, Jubilant FoodWorks, Avanti Feeds, Bajaj Hindusthan Sugar, Bharat Dynamics, Clariant Chemicals, Cochin Shipyard, Fortis Healthcare will be in focus ahead of latest earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	191.8	360.4	103.8
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)	86,031	66,807	56,342
F&O(INR cr)	3,638,199	2,440,829	1,869,175

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.5	30.0	30.2
NSE VIX	22.0	22.2	27.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,845	0.8 %	58.4 %	Energy	15,774	0.4 %	46.4 %
IT	21,330	1.7 %	77.1 %	Pharma	11,570	3.6 %	64.7 %
Metals	2,645	3.5 %	70.3 %	Finance	13,890	1.4 %	55.3 %
Auto	8,255	1.6 %	77.2 %	PSU	1,433	(0.5) %	11.7 %
FMCG	30,846	1.2 %	17.0 %	Real Estate	237	0.8 %	37.6 %

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>
Tata Steel	474	7.3 %	77.9 %	IndusInd B	788	(5.7) %	130.2 %
Aurobindo	811	6.5 %	106.7 %	Reliance I	1,997	(4.2) %	86.6 %
Lupin	911	6.1 %	57.3 %	SBI Cards	806	(4.0) %	32.5 %
Hindalco I	204	6.1 %	122.6 %	NMDC	91	(3.5) %	15.5 %
Indraprast	448	5.9 %	14.8 %	Havells In	815	(3.2) %	68.1 %

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					

..... End of Report