



13 Nov.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,691	(0.5) %	53.8 %
BSE SENSEX	43,357	(0.5) %	53.4 %
CNX BANK	28,279	(2.0) %	55.3 %
CNX MIDCAP	18,183	0.6 %	58.5 %
CNX SMALLCAP	5,995	1.3 %	69.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,080	(1.1) %	1.9 %
S&P 500	3,537	(1.0) %	9.5 %
FTSE 100	6,339	(0.7) %	(16.6) %
HANG SENG	26,169	(0.2) %	(8.3) %
NIKKEI	25,521	0.7 %	10.0 %
SHANGHAI COMPOSITE	3,339	(0.1) %	8.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.26	0.6 %	4.3 %
EUR/USD	1.18	(0.6) %	5.1 %
GBP/USD	1.32	0.6 %	0.4 %
USD/JPY	105.39	1.0 %	(3.0) %
USD/AUD	1.37	0.0 %	(3.8) %
USD/SGD	1.35	0.3 %	0.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(5.0) %	(32.2) %
Gold(INR/10g)	50,536	0.0 %	29.6 %
Gold Comex(USD/oz)	1,871	0.0 %	21.3 %
SILVER(INR/1Kg)	62,704	0.7 %	36.2 %
Aluminium(USD/MT)	1,905	1.3 %	7.5 %
Copper(USD/MT)	6,913	0.7 %	12.1 %

**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:** The US Labor Department said its consumer price index was unchanged in October after rising by 0.2% in September. The Labor Department said initial jobless claims fell to 709,000, a decrease of 48,000 from the previous week's revised level of 757,000. Eurozone industrial production dropped for the first time in five months in September, Eurostat reported Thursday. Industrial output fell 0.4% in September from August, when it was up 0.6%. Among components, durable consumer goods output decreased 5.3% and energy output dropped 1%. The production of intermediate goods and non-durable consumer goods gained 0.5% and 2.1%, respectively though. On a yearly basis, the decline in industrial production came in at 6.8% versus a 6.7% fall in August. In the broad EU27, industrial production remained flat on month but decreased 5.8% annually in September. The UK moved out of recession at a record pace in the third quarter following the continued easing of lockdown restrictions, the Office for National Statistics reported Thursday. Gross domestic product grew 15.5% sequentially in the third quarter, which was the biggest expansion seen since records began in 1955. However, the GDP was still 9.7% below where it was at the end of 2019. On a yearly basis, the economy shrank 9.6% in the third quarter. Japan's core machinery orders fell 4.4% on a monthly basis in September following a 0.2% rise in August, data published by the Cabinet Office showed Thursday. This was the first fall in three months. On year-on-year, core machinery orders were down 11.5%. The overall machinery orders also dropped 4.4% on month in September after a 19.8% spurt in the previous month.

**Global Equities:** DOW cracked lower as US coronavirus infections surged. Buying was thin overall after recent surge.

**Indian Economy:** Union Finance Minister Nirmala Sitharaman announced Centre's third fiscal stimulus, Atmanirbhar Bharat 3.0. The size of the stimulus being provided by the government, as part of the 12 announcements amounts to Rs 2.65 lakh crore (around 15% of national GDP), Sitharaman stated. The September Index of Industrial Production (IIP) showed recovery as it entered positive territory after contracting for a consecutive six months. For September, IIP grew at 0.2%. Retail inflation accelerated to six year high of 7.61% in October as food inflation hit 11.07%.

**Equity Markets:** Benchmark indices corrected on Thursday, snapping the eight-day rising streak. FM Nirmala Sitharaman's measures to boost economy failed to cheer investors. The Nifty ended near 12,700 mark after sliding below 12,650 mark in intraday trade. Banks, financial and metal stocks corrected while FMCG and pharma stocks advanced.

**Corporate News:** TCS will acquire certain assets and employees of Pramerica Systems Ireland from insurance firm Prudential Financial Inc (PFI), media reports noted. Eicher Motors reported a lower profit at Rs 343.3 crore in Q2FY21 against Rs 572.7 crore, revenue declined to Rs 2,133.6 crore from Rs 2,192.5 crore YoY. ONGC, Tata Steel, Equitas Holdings, Eveready Industries, Future Retail, General Insurance Corporation of India, Graphite India will be in focus ahead of their quarterly earnings.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1,155.5	459.8	110.7
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)	66,683	66,793	56,428
F&O(INR cr)	5,531,325	2,784,217	1,892,802

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.5	30.0	30.2
NSE VIX	20.6	22.1	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	28,279	(2.0) %	55.3 %	Energy	15,743	(0.2) %	46.2 %
IT	21,363	0.2 %	77.4 %	Pharma	11,601	0.3 %	65.1 %
Metals	2,637	(0.3) %	69.7 %	Finance	13,743	(1.1) %	53.7 %
Auto	8,284	0.3 %	77.9 %	PSU	1,400	(2.3) %	9.1 %
FMCG	31,240	1.3 %	18.5 %	Real Estate	239	0.7 %	38.6 %

### 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>
Adani Gree	942	5.0 %	516.3 %	Bank of Ba	46	(3.3) %	(10.9) %
Info Edg.(	3,677	3.7 %	82.6 %	St Bk of I	227	(3.2) %	21.6 %
Aurobindo	839	3.5 %	113.9 %	SBI Cards	781	(3.1) %	28.5 %
Grasim Ind	827	3.0 %	73.7 %	Coal India	122	(3.0) %	(12.4) %
Hind. Unil	2,192	2.9 %	0.6 %	Kotak Mah.	1,755	(2.9) %	48.5 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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