



14 Oct.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,935	0.0 %	44.6 %
BSE SENSEX	40,626	0.1 %	43.7 %
CNX BANK	23,492	(0.9) %	29.0 %
CNX MIDCAP	16,913	(0.5) %	47.4 %
CNX SMALLCAP	5,845	(0.2) %	65.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,680	(0.6) %	0.5 %
S&P 500	3,512	(0.6) %	8.7 %
FTSE 100	5,970	(0.5) %	(21.5) %
HANG SENG	24,650	2.2 %	(13.6) %
NIKKEI	23,602	0.2 %	1.7 %
SHANGHAI COMPOSITE	3,360	0.0 %	8.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.11	(0.1) %	2.7 %
EUR/USD	1.18	0.4 %	5.3 %
GBP/USD	1.30	0.9 %	(1.1) %
USD/JPY	105.44	(0.5) %	(3.0) %
USD/AUD	1.39	(0.8) %	(2.8) %
USD/SGD	1.36	(0.2) %	0.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	2.0 %	(34.3) %
Gold(INR/10g)	50,914	(0.2) %	30.6 %
Gold Comex(USD/oz)	1,890	(1.7) %	22.5 %
SILVER(INR/1Kg)	61,952	(1.1) %	34.5 %
Aluminium(USD/MT)	1,841	0.6 %	3.9 %
Copper(USD/MT)	6,700	(1.0) %	8.7 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	(0.0) %	(1.2) %

**Global Economy:** The International Monetary Fund (IMF), in its latest World Economic Outlook forecast a 4.4% contraction for the world economy this year, which is less severe than the 5.2% drop seen in June. However, IMF noted that the recovery for the global economy will likely be long, uneven, and uncertain. The global economy is expected to record 5.2% growth next year, compared to the 5.4% expansion seen earlier. Advanced economies are expected to shrink 5.8% this year, which is much less than the June prediction of an 8.1% contraction. They are forecast to grow 3.9% next year. Emerging market and developing countries, excluding China, are expected to see a contraction of 5.7% versus the 5% seen in June. They are expected to grow 5% next year. The US Labor Department said its consumer price index rose by 0.2% in September after jumping by 0.4% in August. China's exports continued to expand as global industrial operations resumed gradually and imports rebounded in September driven by robust domestic demand, official data revealed on Tuesday. Data from the General Administration of Customs showed that exports grew 9.9% year-on-year, faster than the 9.5% increase seen in August. China's imports advanced 13.2% in September, in contrast to a 2.1% decline a month ago. Consequently, the trade balance showed a surplus of \$37 billion compared to the expected level of \$58 billion. The surplus totaled around \$58.9 billion in August. German economic sentiment fell to 56.1 in October from 77.4 in September, survey data from the ZEW - Leibniz Centre for European Economic Research showed on Tuesday. This was the lowest since last May.

**Global Equities:** US stocks eased amid choppy trades as buying was limited after recent spurt.

**Indian Economy:** The IMF expects India's gross domestic product (GDP) to decline by 10.3 percent in FY21. It revised India's GDP growth, since its June forecast of a 4.5% drop, reflecting a severe-than-anticipated contraction in economic activities in Q1 FY21, amid the nationwide lockdown due to the COVID-19 pandemic.

**Equity Markets:** The benchmark indices ended a tad above the flat line on Tuesday. IT shares bucked weak broader sentiment. The S&P BSE Sensex, rose 31.71 points or 0.08% at 40,625.51. The Nifty 50 index added 3.55 points or 0.03% at 11,934.50.

**Corporate News:** Wipro recorded a 3.40% year-on-year fall in consolidated net profit at Rs 2,465.70 crore for the quarter ended September 30. Consolidated revenue of the company declined marginally 0.07% YoY to Rs 15,114.50 crore. Wipro's board also approved a proposal to buyback shares worth up to Rs 9,500 crore to reward stakeholders. The IT firm will repurchase 23.75 crore shares at Rs 400 per share. PNB Gilts said CRISIL re-affirmed its credit rating of 'A1+' as assigned to its Rs 1,000 crore commercial paper programme. TVS Motor Company will be in focus as LIC increased stake in company to 4.87% in September quarter from 3.18% in the June quarter.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	241.5	117.3	87.5
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)	52,307	55,403	55,827
F&O(INR cr)	1,548,922	2,378,970	1,744,936

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.1	27.0	30.0
NSE VIX	20.7	20.0	28.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,492	(0.9) %	29.0 %	Energy	14,912	1.1 %	38.4 %
IT	22,493	1.3 %	86.7 %	Pharma	11,937	(1.8) %	69.9 %
Metals	2,250	0.4 %	44.8 %	Finance	11,481	(0.9) %	28.4 %
Auto	8,053	(0.6) %	72.9 %	PSU	1,291	(1.5) %	0.6 %
FMCG	29,927	(0.3) %	13.5 %	Real Estate	212	(0.3) %	23.4 %

### 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	705	5.0 %	361.2 %	Bharti Inf	182	(3.8) %	17.2 %
Hindustan	206	4.0 %	28.5 %	Cipla	787	(3.3) %	90.2 %
HCL Techno	900	4.0 %	117.7 %	Bosch	12,159	(3.0) %	31.7 %
Info Edg.(	3,579	2.9 %	77.7 %	Aurobindo	810	(2.9) %	106.5 %
Kotak Mah.	1,345	2.4 %	13.8 %	Piramal En	1,278	(2.8) %	36.5 %

### 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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