



15 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,971	0.3 %	45.0 %
BSE SENSEX	40,795	0.4 %	44.3 %
CNX BANK	23,875	1.6 %	31.1 %
CNX MIDCAP	16,886	(0.2) %	47.2 %
CNX SMALLCAP	5,860	0.3 %	65.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,514	(0.6) %	(0.1) %
S&P 500	3,489	(0.7) %	8.0 %
FTSE 100	5,935	(0.6) %	(22.0) %
HANG SENG	24,667	0.1 %	(13.6) %
NIKKEI	23,627	0.1 %	1.8 %
SHANGHAI COMPOSITE	3,341	(0.6) %	8.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.26	0.7 %	2.9 %
EUR/USD	1.18	(0.4) %	5.0 %
GBP/USD	1.30	(0.3) %	(1.4) %
USD/JPY	105.47	(0.2) %	(2.9) %
USD/AUD	1.39	0.9 %	(2.2) %
USD/SGD	1.36	0.4 %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	2.0 %	(34.3) %
Gold(INR/10g)	50,467	(0.9) %	29.4 %
Gold Comex(USD/oz)	1,890	(1.7) %	22.5 %
SILVER(INR/1Kg)	60,634	(2.1) %	31.7 %
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 US Labor Department released a report on Wednesday showing US producer prices increased by more than expected in the month of September. The Labor Department said its producer price index for final demand rose by 0.4% in September after rising by 0.3% in August. Eurozone industrial production rose at a slower pace in August, data published by Eurostat showed Wednesday. The industrial production edged up 0.7% month-on-month, following July's 5% increase. The non-durable consumer goods and capital goods production dropped 1.6% each. The production of durable consumer goods rose 6.8% and that of intermediate goods gained 3.1%. Energy production also rose 2.3% from the last month. On a yearly basis, industrial output logged a decline of 7.2% after falling 7.1% in July. Australia's consumer confidence improved sharply in October following the announcement of the federal budget and the ongoing success in containing the Covid-19 outbreak, survey data from Westpac showed Wednesday. The Westpac-Melbourne Institute Index of Consumer Sentiment advanced 11.9 percent to 105.0 in October from 93.8 in September.

Global Equities: US stocks slipped as stimulus remained in a limbo and investors braced for third quarter earnings.

Indian Economy: The annual rate of inflation based on Wholesale Price Index (WPI) stood at 1.32% (provisional) for the month of September, 2020 (over September, 2019) as compared to 0.33% during the corresponding month of the previous year. The wholesale price-based inflation stood at 0.16% in August. The Department of Expenditure, Ministry of Finance, has granted permission to 20 States to raise an additional amount of Rs.68,825 crore through open market borrowings. Additional borrowing permission has been granted @ 0.50 % of the Gross State Domestic Product (GSDP) to those States who have opted for Option- 1 out of the two options suggested by the Ministry of Finance to meet the shortfall arising out of GST implementation.

Equity Markets: The benchmark indices ended near the day's high after a volatile session on Wednesday. The barometers corrected early today after International Monetary Fund (IMF) slashed India's economic growth forecast in the wake of the coronavirus pandemic. After trading in a narrow range near the day's low for most part of the session, the key indices regained vigor in the final hour of the trade to end with decent gains.

Corporate News: Infosys, India's second largest software services provider reported 20.5% year-on-year (YoY) increase in the net profit for the September quarter. Consolidated revenue from operations increased to Rs 24,570 crore in Q2FY21, up by 8.6% YoY. The operating profit also rose to Rs 6,228 crore, rising 26.8% YoY. Infosys revised its revenue growth guidance upward to 2-3% in constant currency for financial year 2020-21, from 0-2% earlier. Tata Elxsi reported profit of Rs 78.9 crore in Q2FY21 compared to Rs 49.8 crore YoY, up 58%. The company's revenue rose to Rs 430.2 crore from Rs 385.8 crore YoY. Jubilant Foodworks will be in focus as FPIs raised stake in company to 37.86% in September quarter, from 36.19% in June quarter. Passenger and commercial vehicle sales are projected to post double-digit growth next financial year after decadal low sales this fiscal, according to rating and research agency ICRA, media reports noted.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	255.7	134.6	88.8
MF(INR cr)	(664.9)	(567.1)	(209.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	52,968	55,132	55,805
F&O(INR cr)	2,332,585	2,373,816	1,749,321

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.1	27.0	30.0
NSE VIX	20.2	20.1	28.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,875	1.6 %	31.1 %	Energy	14,755	(1.1) %	37.0 %
IT	22,204	(1.3) %	84.3 %	Pharma	11,857	(0.7) %	68.7 %
Metals	2,252	0.1 %	45.0 %	Finance	11,687	1.8 %	30.7 %
Auto	8,031	(0.3) %	72.4 %	PSU	1,303	1.0 %	1.6 %
FMCG	29,960	0.1 %	13.7 %	Real Estate	215	1.1 %	24.8 %

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>
Info Edg.(3,741	4.5 %	85.7 %	Wipro	350	(6.8) %	84.9 %
Tata Consu	490	4.4 %	74.9 %	NTPC	79	(4.3) %	(2.3) %
Bharti Inf	190	4.2 %	22.2 %	O N G C	67	(3.0) %	1.9 %
SBI Cards	892	4.2 %	46.7 %	Coal India	111	(2.9) %	(20.7) %
Bajaj Fins	6,100	4.0 %	35.5 %	Tata Motor	131	(2.5) %	92.3 %

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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