



19 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,762	0.7 %	42.5 %
BSE SENSEX	39,983	0.6 %	41.5 %
CNX BANK	23,533	2.0 %	29.2 %
CNX MIDCAP	16,787	1.1 %	46.3 %
CNX SMALLCAP	5,839	1.4 %	64.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,606	0.4 %	0.2 %
S&P 500	3,484	0.0 %	7.8 %
FTSE 100	5,920	1.5 %	(22.2) %
HANG SENG	24,387	0.9 %	(14.6) %
NIKKEI	23,411	(0.4) %	0.9 %
SHANGHAI COMPOSITE	3,336	0.1 %	8.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.26	0.1 %	2.9 %
EUR/USD	1.17	(0.2) %	4.5 %
GBP/USD	1.30	(0.2) %	(1.8) %
USD/JPY	105.32	0.0 %	(3.1) %
USD/AUD	1.41	1.0 %	(1.2) %
USD/SGD	1.36	0.1 %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(0.2) %	(33.2) %
Gold(INR/10g)	50,796	0.6 %	30.3 %
Gold Comex(USD/oz)	1,899	(0.4) %	23.1 %
SILVER(INR/1Kg)	61,330	2.1 %	33.2 %
Aluminium(USD/MT)	1,866	2.3 %	5.3 %
Copper(USD/MT)	6,728	0.7 %	9.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.8	0.1 %	(1.2) %

Global Economy: The US consumer sentiment index rose to 81.2 in October from the final September reading of 80.4. The bigger than expected increase by the headline index came as the index of consumer expectations climbed to 78.8 in October from 75.6 in September, reaching its highest level since March. On the other hand, the report said the current economic conditions index fell to 84.9 in October after jumping to 87.8 in September. The US Fed said industrial production fell by 0.6% in September after rising by 0.4% in August. The Commerce Department said US retail sales soared by 1.9% in September after rising by 0.6% in August. Euroarea exports grew 2% on a monthly basis and imports advanced 0.5%, data from Eurostat revealed Friday. However, exports and imports continued to stay below the pre-crisis level, Eurostat reported. Eurozone consumer prices decreased 0.3% on a yearly basis in September, following a 0.2% drop in August, final data from Eurostat revealed Friday. A similar lower rate was last seen in April 2016. The European Central Bank aims to keep inflation "below, but close to 2%." But the bank expects inflation to average 1% in 2021 and 1.3% in 2022. Month-on-month, the harmonized index of consumer prices gained 0.1% in September. Core inflation that excludes volatile energy, food, alcohol and tobacco, halved to a record 0.2% from 0.4% in August. Europe's passenger car sales grew for the first time this year in September showing signs of recovery in the automobile sector, the European Automobile Manufacturers Association, or ACEA, reported Friday. Car registrations across the European Union grew 3.1% on a yearly basis to 933,987 units in September.

Global Equities: DOW came off intraday highs amid uncertain outlook on the stimulus front. Rising Covid-19 cases in Europe also weighed.

Indian Economy: Foodgrains production is pegged at record 144.52 million tonnes in the 2020-21 kharif season notwithstanding COVID-19 crisis, Agriculture Minister Narendra Singh Tomar said on Friday. Tomar said this while addressing a digital conference organised by industry body CII. Production of cash crops such as sugarcane and cotton is also expected to be good, he said. Despite the COVID-19 pandemic, there has been a record increase in area sown to kharif crops by 4.51% to 1,121.75 lakh hectares this year, the minister noted.

Equity Markets: Key equity indices ended with modest gains on Friday with the Nifty reclaiming the 11,750 level. Banks and metal shares were in demand. Domestic shares bounced on value buying after a steep selloff in the previous session.

Corporate News: HDFC Bank reported an 18.4% year-on-year (y-o-y) growth in profit at Rs 7,513.11 crore for the September quarter. Net interest income, the difference between interest earned and interest expended, increased by 16.7% y-o-y to Rs 15,776.4 crore in the September quarter, driven by asset growth of 21.5% and a core net interest margin for the quarter at 4.1%. Britannia Industries, HDFC Life Insurance Company, L&T Technology Services, ACC, Bank of Maharashtra, Rallis India will be in focus ahead of quarterly earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(40.0)	119.3	88.3
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)	51,625	55,138	55,795
F&O(INR cr)	1,448,500	2,603,419	1,777,076

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.4	26.9	29.9
NSE VIX	21.7	20.4	28.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,533	2.0 %	29.2 %	Energy	14,563	0.7 %	35.2 %
IT	21,538	(0.1) %	78.8 %	Pharma	11,814	1.5 %	68.1 %
Metals	2,330	4.0 %	50.0 %	Finance	11,513	1.5 %	28.7 %
Auto	7,959	0.3 %	70.9 %	PSU	1,270	0.3 %	(1.0) %
FMCG	29,671	0.1 %	12.6 %	Real Estate	215	2.6 %	25.0 %

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>
JSW Steel	311	6.7 %	117.5 %	UPL	467	(7.8) %	52.7 %
Tata Steel	394	5.3 %	47.9 %	L & T Info	3,075	(6.7) %	120.9 %
DLF	163	4.6 %	22.6 %	HCL Techno	827	(3.8) %	100.0 %
B P C L	340	4.1 %	12.2 %	SBI Cards	880	(2.3) %	44.7 %
Lupin	1,040	3.7 %	79.7 %	M & M	607	(1.7) %	122.3 %

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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