



20 Oct.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,873	0.0 %	43.8 %
BSE SENSEX	40,432	1.1 %	43.0 %
CNX BANK	24,267	0.0 %	33.3 %
CNX MIDCAP	16,916	0.0 %	47.5 %
CNX SMALLCAP	5,882	0.0 %	66.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,195	(1.4) %	(1.2) %
S&P 500	3,427	(1.6) %	6.1 %
FTSE 100	5,885	(0.6) %	(22.6) %
HANG SENG	24,542	0.6 %	(14.0) %
NIKKEI	23,671	1.1 %	2.0 %
SHANGHAI COMPOSITE	3,313	(0.7) %	7.4 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.24	0.1 %	2.9 %
EUR/USD	1.17	(0.3) %	4.4 %
GBP/USD	1.29	(0.5) %	(2.1) %
USD/JPY	105.44	0.1 %	(3.0) %
USD/AUD	1.41	1.3 %	(0.9) %
USD/SGD	1.36	0.1 %	1.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(0.2) %	(33.2) %
Gold(INR/10g)	50,828	0.1 %	30.3 %
Gold Comex(USD/oz)	1,899	(0.4) %	23.1 %
SILVER(INR/1Kg)	62,337	1.6 %	35.4 %
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 NAHB/Wells Fargo Housing Market Index rose to 85 in October from 83 in September. China's gross domestic product was up 4.9% on year in the third quarter of 2020, the National Bureau of Statistics said on Monday, up from 3.2% in the three months prior. China's fixed-asset investment went up 0.8% year on year in the first three quarters of 2020. Total fixed-asset investment came in at 43.65 trillion yuan during the period. China's value-added industrial output, rose 5.8% year on year in the third quarter. In the first three quarters, industrial output went up 1.2% year on year, reversing a drop of 1.3% in the first half of the year. China's retail sales rose 3.3% year on year in September. The growth picked up after the sales posted their first positive growth this year in August by rising 0.5% year on year. Retail sales of consumer goods rose 0.9% year on year in the third quarter of the year, marking first positive quarterly growth this year. In the first three quarters, the retail sales slipped 7.2% year on year.

**Global Equities:** US stocks fell with DOW sliding more than 1% as worries over the US lawmakers reaching a workable fiscal stimulus deal ahead of a Tuesday deadline hurt the sentiments.

**Indian Economy:** The minister Nirmala Sitharaman said that capital expenditure (CAPEX) by Central Public Sector Enterprises (CPSEs) is a critical driver of economic growth and need to be scaled up for the financial years 2020-21 and 2021-22. FM reviewed the capital expenditure of CPSEs in this financial year. The CAPEX target for 2020-21 is Rs 1,15,934 crore. India's national cumulative Covid-19 positivity rate has fallen under 8%, an update from Ministry of Health and Family Welfare stated on Monday. This trend has been sustained without a break for four days. The cumulative Positivity Rate is 7.94% now and is on a continuous decline. This has been brought about by high level of comprehensive country-wide testing. The total tests have crossed 9.5 crores.

**Equity Markets:** The benchmarks indices ended with strong gains on Monday, led by the rally in bank stocks. The barometer index, the S&P BSE Sensex, jumped 448.62 points or 1.12% to 40,431.60. The Nifty 50 index added 110.60 points or 0.94% to 11,873.05.

**Corporate News:** Britannia Industries reported 23% YoY increase in profit at Rs 498 crore against Rs 404 crore while revenue rose 12% to Rs 3,419 crore from Rs 3,048.84 crore YoY. ACC reported profit at Rs 363.8 crore in Q3CY20 against Rs 302.5 crore while revenue increased to Rs 3,537.3 crore from Rs 3,528.3 crore YoY. Two-wheeler market leader Hero MotoCorp on Monday launched a new edition of its iconic Splendor motorcycle priced at Rs 64,470 (ex-showroom Delhi).



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(1.2)	108.4	87.7
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)	50,677	54,767	55,757
F&O(INR cr)	1,635,134	2,522,729	1,776,040

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.4	26.9	29.9
NSE VIX	21.8	20.5	28.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,267	3.1 %	33.3 %	Energy	14,743	1.2 %	36.9 %
IT	21,392	(0.7) %	77.6 %	Pharma	11,617	(1.7) %	65.3 %
Metals	2,368	1.6 %	52.4 %	Finance	11,804	2.5 %	32.0 %
Auto	7,870	(1.1) %	69.0 %	PSU	1,323	4.2 %	3.1 %
FMCG	30,069	1.3 %	14.1 %	Real Estate	218	1.5 %	26.9 %

### 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>
Bank of Ba	44	8.2 %	(14.9) %	Divi's Lab	3,093	(4.0) %	64.8 %
General In	126	5.6 %	19.4 %	Info Edg.(	3,476	(3.4) %	72.6 %
Avenue Sup	2,094	5.5 %	0.6 %	Eicher Mot	2,198	(3.2) %	69.1 %
ICICI Bank	417	5.3 %	34.1 %	Hero Motoc	3,249	(2.9) %	98.1 %
Axis Bank	493	4.4 %	37.4 %	Torrent Ph	2,673	(2.6) %	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>					

..... End of Report .....