



21 Oct.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|--------|
| CNX NIFTY | 11,897 | 0.2 % | 44.1 % |
| BSE SENSEX | 40,544 | 0.3 % | 43.4 % |
| CNX BANK | 24,312 | 0.2 % | 33.5 % |
| CNX MIDCAP | 17,023 | 0.6 % | 48.4 % |
| CNX SMALLCAP | 5,904 | 0.4 % | 66.8 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 28,309 | 0.4 % | (0.8) % |
| S&P 500 | 3,443 | 0.5 % | 6.6 % |
| FTSE 100 | 5,889 | 0.1 % | (22.6) % |
| HANG SENG | 24,570 | 0.1 % | (13.9) % |
| NIKKEI | 23,567 | (0.4) % | 1.6 % |
| SHANGHAI COMPOSITE | 3,328 | 0.5 % | 7.9 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 73.25 | (0.0) % | 2.9 % |
| EUR/USD | 1.18 | 0.3 % | 4.8 % |
| GBP/USD | 1.30 | 0.1 % | (1.7) % |
| USD/JPY | 105.42 | 0.1 % | (3.0) % |
| USD/AUD | 1.41 | 0.1 % | (1.1) % |
| USD/SGD | 1.36 | (0.2) % | 0.9 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 41 | (0.1) % | (33.3) % |
| Gold(INR/10g) | 50,766 | (0.1) % | 30.2 % |
| Gold Comex(USD/oz) | 1,901 | 0.1 % | 23.3 % |
| SILVER(INR/1Kg) | 61,836 | (0.8) % | 34.3 % |
| Aluminium(USD/MT) | 1,848 | (0.9) % | 4.3 % |
| Copper(USD/MT) | 6,755 | 0.4 % | 9.6 % |

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 | 0.0 % | (1.2) % |

Global Economy: China's central bank kept its benchmark lending rates unchanged for the sixth consecutive month. The one-year loan prime rate was retained at 3.85% and the five-year loan prime rate was maintained at 4.65%. The one-year and five-year loan prime rates were last cut in April. The one-year loan prime rate was lowered by 20 basis points and five-year rate by 10 basis points in April. Economic data has been optimistic for the Chinese economy recently after a torrid first few months as Covid-19 wreaked havoc and crippled the business and consumer sentiments. Germany's producer prices were down 1% year-on-year in September, slower than the 1.2% decrease seen in August, data from Destatis revealed Tuesday. Prices have decreased for the eighth consecutive month. On a monthly basis, producer prices gained 0.4% after staying flat in August. Excluding energy, producer prices dropped only 0.2% from last year. Energy prices slid 3.3%. S&P Global Ratings retained the sovereign ratings of Australia at 'AAA' with a negative outlook as the agency expects the fiscal deficits to persist and debt levels to be elevated for years to come, media reports noted. The agency said the Covid-19 pandemic dealt Australia a severe economic and fiscal shock, which has substantially deteriorated the government's fiscal headroom at the 'AAA' rating level.

Global Equities: US stocks recovered after the correction seen on Monday as market focussed on fresh aid package to bolster the economic recovery.

Indian Economy: The All-India Consumer Price Index (CPI) Numbers for Agricultural Labourers (AL) and Rural Labourers (RL) (Base: 1986-87=100) for the month of September, 2020 increased by 11 points and 10 points to stand at 1037 (One thousand and thirty seven) and 1043 (One thousand and forty three) points respectively. The major contribution towards the rise in general index of Agricultural Labourers and Rural Labourers came from food, with (+) 9.20 points and (+) 8.95 points respectively mainly due to rise in prices of arhar dal, masur dal, ground nut oil, mustard oil, vegetables and fruits etc. Aggregate sales of private sector manufacturing companies recorded a sharp contraction of 41.1 per cent year-on-year in the first quarter of 2020-21, reflecting the impact of the pandemic induced lockdown, according to RBI.

Equity Markets: The domestic equity barometers ended with decent gains after a see-saw trade on Tuesday. As per provisional closing data, the barometer index, the S&P BSE Sensex, rose 112.77 points or 0.28% at 40,544.37. The Nifty 50 index added 25.25 points or 0.21% at 11,898.30. In the broader market, the S&P BSE Mid-Cap index gained 0.47% while the S&P BSE Small-Cap index rose 0.30%. Both these indices outperformed the Sensex.

Corporate News: Reliance Jio and US-based Qualcomm will join hands to fast-track the deployment of 5G mobile internet based on homegrown technologies, according to media reports. Brigade Enterprises Subsidiary Mysore Projects entered into a liability partnership agreement with Prestige Estates Projects in Prestige OMR Ventures for a 30 percent contribution. Bajaj Auto will be in focus as LIC increased stake in the company to 6.4% in the September quarter from 4.76% in the June quarter.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 271.1 | 122.0 | 89.0 |
| 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) | 49,908 | 54,393 | 55,714 |
| F&O(INR cr) | 1,685,767 | 2,458,347 | 1,775,385 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 29.2 | 27.1 | 29.9 |
| NSE VIX | 22.7 | 20.7 | 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 | 24,312 | 0.2 % | 33.5 % | Energy | 14,529 | (1.5) % | 34.9 % |
| IT | 21,694 | 1.4 % | 80.1 % | Pharma | 11,644 | 0.2 % | 65.7 % |
| Metals | 2,363 | (0.2) % | 52.1 % | Finance | 11,821 | 0.1 % | 32.2 % |
| Auto | 7,897 | 0.3 % | 69.5 % | PSU | 1,305 | (1.4) % | 1.7 % |
| FMCG | 29,965 | (0.3) % | 13.7 % | Real Estate | 227 | 3.9 % | 31.9 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Bharti Inf | 190 | 4.9 % | 22.5 % | Britannia | 3,553 | (5.8) % | 38.5 % |
| HCL Techno | 880 | 4.1 % | 112.7 % | Bank of Ba | 42 | (4.0) % | (18.3) % |
| Tech Mahin | 850 | 3.1 % | 66.2 % | ONGC | 67 | (2.7) % | 2.5 % |
| Asian Pain | 2,119 | 2.3 % | 32.1 % | IOCL | 75 | (2.3) % | (4.9) % |
| Avenue Sup | 2,143 | 2.3 % | 2.9 % | Punjab Nat | 27 | (2.1) % | (10.2) % |

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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