



22 Sep.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,251	0.0 %	36.3 %
BSE SENSEX	38,034	(2.1) %	33.5 %
CNX BANK	21,367	0.0 %	17.3 %
CNX MIDCAP	16,765	0.0 %	46.2 %
CNX SMALLCAP	5,758	0.0 %	62.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,148	(1.8) %	(4.9) %
S&P 500	3,281	(1.2) %	1.6 %
FTSE 100	5,804	(3.4) %	(23.7) %
HANG SENG	23,951	(2.1) %	(16.1) %
NIKKEI	23,360	0.2 %	0.7 %
SHANGHAI COMPOSITE	3,317	(0.6) %	7.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.44	(0.1) %	3.1 %
EUR/USD	1.18	(0.0) %	5.6 %
GBP/USD	1.29	(0.2) %	(2.0) %
USD/JPY	104.58	(0.5) %	(3.7) %
USD/AUD	1.37	0.4 %	(3.8) %
USD/SGD	1.36	0.1 %	1.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	39	(4.4) %	(35.7) %
Gold(INR/10g)	51,258	(0.7) %	31.4 %
Gold Comex(USD/oz)	1,917	(2.2) %	24.3 %
SILVER(INR/1Kg)	63,618	(2.8) %	38.1 %
Aluminium(USD/MT)	1,753	0.4 %	(1.1) %
Copper(USD/MT)	6,837	0.1 %	10.9 %

**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) %	(1.3) %

**Global Economy:** The US Federal Reserve approved a revamp of the anti-redlining rules known as the Community Reinvestment Act, or CRA, in a live-streamed meeting on Monday morning and gave 120 days for community and industry feedback. China retained its benchmark rates for the fifth straight month as the economy continued to see good recovery from the downturn caused by the coronavirus pandemic. The one-year loan prime rate was kept at 3.85% and the five-year loan prime rate was maintained at 4.65%. UK house prices rose at the fastest pace in four years in September driven by higher demand for larger homes, data published by the property website Rightmove showed Monday. House price inflation jumped to 5% from 4.6% in August. House prices rose 0.2% on month-on-month basis in September following a 0.2% slide in August. UK households' perception about the financial well-being showed another sharp fall in September but this was less severe than the fall logged at the height of the covid-19 pandemic, survey data published by IHS Markit showed Monday. The household finance index remained unchanged at 40.8 in September. Households' perceptions of their finances in 12 months' time weakened in September, with the respective index reaching the lowest since May. Spending decreased moderately though the reduction was the weakest in the current six-month sequence of falls.

**Global Equities:** Global stocks slumped as rising Covid-19 cases in Europe and worries over economic growth hurt the sentiments. The German DAX lost more than 4%.

**Indian Economy:** The latest CII Business Confidence Index has surged to the level of 50.3 in Jul-Sep 2020, bouncing back from its lowest reading of 41.0 recorded in Apr-Jun 2020. The stellar recovery in the index has been supported by the remarkable increase in the Expectations Index (EI), which rose 46% quarter-on-quarter, to the level of 55.2, as nation-wide lockdown restrictions were lifted, and businesses gradually began to reopen during the Jul-Sep quarter. The Current Situation Index (CSI), however, continued to trail below 50, at 40.6, depicting weak confidence during the Apr-Jun 2020- a period marked with stringent lockdown measures and complete shutdown of business operations. The government on Monday hiked the minimum price for buying six rabi crops, including wheat, by up to 6%. The MSP (Minimum Support Price) of wheat, the biggest crop of rabi season, has been hiked by Rs 50 to Rs 1,975 per quintal, agriculture minister Narendra Singh Tomar said in Lok Sabha.

**Equity Markets:** Domestic shares tumbled across the board on Monday as dismal global cues and rising COVID-19 cases triggered profit selling. The barometer index, the S&P BSE Sensex, fell 811.68 points or 2.09% at 38,034.14. The Nifty 50 index lost 254.40 points or 2.21% at 11,250.55.

**Corporate News:** State Bank of India has kicked off its due diligence for restructuring of retail loans by announcing a two-step process. GMM Pfaudler said its promoter will sell 25.71 lakh shares via offer for sale, floor price set at Rs 3,500 per share on September 22-23. Phillips Carbon Black will be in focus as CARE has reaffirmed the company's long term credit rating at AA-/Stable.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	248.8	58.0	105.4
MF(INR cr)	(393.4)	(471.3)	(219.1)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	67,539	59,630	56,188
F&O(INR cr)	1,807,273	2,109,847	1,671,507

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.8	28.1	30.4
NSE VIX	22.2	21.2	29.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,367	(3.0) %	17.3 %	Energy	15,366	(2.6) %	42.7 %
IT	19,729	(0.5) %	63.8 %	Pharma	11,800	(4.2) %	67.9 %
Metals	2,240	(5.2) %	44.2 %	Finance	10,527	(2.0) %	17.7 %
Auto	7,832	(4.0) %	68.2 %	PSU	1,328	(4.2) %	3.5 %
FMCG	29,542	(3.0) %	12.1 %	Real Estate	214	(5.6) %	24.3 %

### 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>
Oracle Fin	3,046	1.8 %	58.6 %	IndusInd B	561	(8.6) %	63.8 %
Kotak Mah.	1,288	0.8 %	9.0 %	Bandhan Ba	277	(7.2) %	42.2 %
Infosys	1,010	0.8 %	67.5 %	Tata Motor	137	(7.1) %	102.3 %
TCS	2,465	0.6 %	44.3 %	Motherson	114	(6.9) %	97.0 %
				Hindalco I	167	(6.9) %	82.4 %

### 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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