



22 Oct.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,938	0.3 %	44.6 %
BSE SENSEX	40,707	0.4 %	44.0 %
CNX BANK	24,635	1.3 %	35.3 %
CNX MIDCAP	17,065	0.2 %	48.8 %
CNX SMALLCAP	5,898	(0.1) %	66.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,211	(0.4) %	(1.1) %
S&P 500	3,436	(0.2) %	6.3 %
FTSE 100	5,777	(1.9) %	(24.0) %
HANG SENG	24,754	0.8 %	(13.3) %
NIKKEI	23,639	0.3 %	1.9 %
SHANGHAI COMPOSITE	3,325	(0.1) %	7.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.31	0.1 %	3.0 %
EUR/USD	1.18	0.8 %	5.2 %
GBP/USD	1.29	0.3 %	(1.8) %
USD/JPY	105.55	0.1 %	(2.9) %
USD/AUD	1.42	0.4 %	(0.5) %
USD/SGD	55.28	3,968.0 %	4,006.5 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	5.7 %	(29.5) %
Gold(INR/10g)	51,230	0.9 %	31.4 %
Gold Comex(USD/oz)	1,914	0.6 %	24.1 %
SILVER(INR/1Kg)	63,047	2.0 %	36.9 %
Aluminium(USD/MT)	1,826	(1.2) %	3.0 %
Copper(USD/MT)	6,814	0.9 %	10.5 %

**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 %	(1.1) %

**Global Economy:** Economic activity continued to increase across all Federal Reserve districts, according to the central bank's Beige Book report released on Wednesday. The Beige Book, a compilation of anecdotal evidence on economic conditions in the twelve Fed districts, noted the pace of economic growth characterized as slight to modest in most districts. The Covid-19 pandemic is exacting a heavy toll on Europe. More than 240,000 people have lost their lives. Millions have suffered the illness themselves, the loss of loved ones, or major disruption in their work, their businesses, and their daily lives, IMF noted in a latest blog post. The economic impact of the pandemic has been enormous. The IMF's latest Regional Economic Outlook for Europe forecasts a 7% decline in Europe's GDP in 2020. The recovery from this crisis will be uneven and partial. UK consumer price inflation accelerated in September, the Office for National Statistics said Wednesday. The consumer prices rose 0.5% annually, following the 0.2% increase in August. On month-on-month basis, the consumer prices rose 0.4% following a 0.4% fall in the previous month. The ONS said that excluding energy, food, alcoholic beverages and tobacco, core inflation increased to 1.3% from 0.9% a month ago. The UK budget deficit widened in September on rising borrowing amid the coronavirus pandemic, the Office for National Statistics (ONS) reported Wednesday. Public sector net borrowing increased by GBP 28.4 billion from the last year to GBP 36.1 billion in September. This was the third highest borrowing in any month since records began in 1993. UK's public debt rose GBP 259.2 billion in the first six months of the financial year to reach GBP 2,059.7 billion at the end of September 2020, or around 103.5% of gross domestic product. This was the highest debt to GDP ratio in nearly seven decades. Australia's leading index rose in September, data from Westpac showed Wednesday. The six-month annualized growth rate in the Westpac Melbourne Institute Leading Index, which indicates the likely pace of economic activity relative to trend three to nine months into the future, rose to -0.48% in September from -2.28% in August.

**Global Equities:** DOW saw continued selling pressure in intraday moves as traders focussed on the development around fresh fiscal stimulus.

**Indian Economy:** The Union Cabinet approved productivity linked bonus and non-productivity linked bonus for 2019-2020. A total of 30.67 lakh non-gazettes employees will be benefited by the bonus announcement and total financial implication will be Rs 3,737 crore. Further, the Cabinet approved adoption of the Jammu and Kashmir Panchayati Raj Act, 1989. For the financial year 2020-21, during April to August, total FDI inflow of US\$ 35.73 billion is received, the ministry of commerce stated. It is the highest ever for first 5 months of a financial year and 13% higher as compared to first five months of 2019-20 (US\$ 31.60 billion). FDI equity inflow received during F.Y. 2020-21 (April to August, 2020) is US\$ 27.10 billion. It is also the highest ever for first 5 months of a financial year and 16% more compared to first five months of 2019-20 (US\$ 23.35 billion).

**Equity Markets:** The benchmark indices ended the roller-coaster session with decent gains on Wednesday. Banks and metal stocks rallied while IT and FMCG shares declined. The barometer index, the S&P BSE Sensex, gained 162.94 points or 0.40% at 40,707.31. The Nifty 50 index added 40.85 points or 0.34% at 11,937.65.

**Corporate News:** Bajaj Finserv reported an 18% decline in consolidated net profit at Rs 986.29 crore for the quarter ended September. Total revenue from operations came in at Rs 15,049.60 crore, up 5.82% YOY. Asian Paints, Bajaj Auto, Bharti Infratel, HDFC Asset Management Company, SBI Cards and Payment Services, Hexaware Technologies, Indian Bank, Biocon, Alembic Pharmaceutical will announce latest quarterly earnings today.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	249.7	131.8	90.2
MF(INR cr)	(1,468.0)	(684.7)	(232.8)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	64,172	55,091	55,776
F&O(INR cr)	3,302,119	2,518,616	1,786,369

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.4	27.3	29.9
NSE VIX	22.9	20.8	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	24,635	1.3 %	35.3 %	Energy	14,644	0.8 %	35.9 %
IT	21,578	(0.5) %	79.1 %	Pharma	11,646	0.0 %	65.7 %
Metals	2,416	2.2 %	55.5 %	Finance	11,964	1.2 %	33.8 %
Auto	7,878	(0.2) %	69.1 %	PSU	1,314	0.7 %	2.4 %
FMCG	29,684	(0.9) %	12.6 %	Real Estate	237	4.4 %	37.6 %

### 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>
Hindustan	233	4.6 %	45.3 %	Britannia	3,397	(4.4) %	32.5 %
L & T Info	3,100	4.6 %	122.7 %	Avenue Sup	2,081	(2.9) %	(0.1) %
Power Grid	164	4.2 %	5.9 %	Tata Consu	465	(2.6) %	66.2 %
Bharti Air	419	3.5 %	(0.6) %	ICICI Pru	412	(2.4) %	20.1 %
H P C L	178	3.1 %	(3.5) %	Colgate-Pa	1,427	(2.3) %	14.8 %

### 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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