



23 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,896	0.0 %	44.1 %
BSE SENSEX	40,558	(0.4) %	43.5 %
CNX BANK	24,484	0.0 %	34.5 %
CNX MIDCAP	17,171	0.0 %	49.7 %
CNX SMALLCAP	5,957	0.0 %	68.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,364	0.5 %	(0.6) %
S&P 500	3,453	0.5 %	6.9 %
FTSE 100	5,786	0.2 %	(23.9) %
HANG SENG	24,786	0.1 %	(13.2) %
NIKKEI	23,474	(0.7) %	1.2 %
SHANGHAI COMPOSITE	3,313	(0.4) %	7.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.45	0.3 %	3.2 %
EUR/USD	1.19	0.9 %	5.7 %
GBP/USD	1.31	0.8 %	(0.9) %
USD/JPY	104.88	(0.5) %	(3.5) %
USD/AUD	1.41	(0.1) %	(1.2) %
USD/SGD	1.36	(0.2) %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(2.0) %	(33.6) %
Gold(INR/10g)	51,149	(0.2) %	31.2 %
Gold Comex(USD/oz)	1,900	(1.3) %	23.2 %
SILVER(INR/1Kg)	62,565	(0.8) %	35.8 %
Aluminium(USD/MT)	1,828	(0.8) %	3.2 %
Copper(USD/MT)	6,886	(1.0) %	11.7 %

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: The US Conference Board released a report on Thursday showing a slowdown in the pace of growth by its reading on leading economic indicators. The Conference Board said its leading economic index climbed by 0.7% in September after surging up by a revised 1.4% in August. The National Association of Realtors said existing home sales soared by 9.4% to an annual rate of 6.54 million in September after jumping by 2% to a revised rate of 5.98 million in August. The Labor Department said initial jobless claims fell to 787,000, a decrease of 55,000 from the previous week's revised level of 842,000. Eurozone consumer confidence weakened more-than-expected to its lowest level in five months in October, preliminary figures from the European Commission showed on Thursday. The flash consumer confidence index for the euro area dropped to -15.5 from -13.9 in September. German forward-looking consumer sentiment index fell more-than-expected to -3.1 in November from -1.7 in October, survey data from the market research group Gfk showed on Thursday. UK manufacturers expect output to grow at a moderate pace and orders to remain unchanged over the coming quarter, according to the quarterly Industrial Trends Survey data released by the Confederation of British Industry today. In the quarter to October, output volumes rose to -8% from -20% in September.

Global Equities: DOW edged up on hopes that the economy is set to get a fiscal boost in near term.

Indian Economy: The corporate bond market needs to become more robust because there is an urgent need to diversify funding requirements from the banking sector, stated the Securities and Exchange Board of India (SEBI) Chairman, Ajay Tyagi while addressing the Inaugural session at the 11th edition of the Confederation Of Indian Industries (CII) Financial Markets Summit. The SEBI Chairman believes that development of bond markets is necessary to help the Government to achieve its target of investment in Infrastructure. It would be a challenging task to achieve the Government's target of achieving Rs 100 lakh crore investments in Infrastructure by 2024-25 unless the bond market is adequately developed, he noted. As announced in the Statement of Developmental and Regulatory Policies on October 09, 2020, the Reserve Bank of India (RBI) has decided to conduct On tap Targeted Long-term Repo Operations of up to three years tenor for a total amount of up to Rs 1,00,000 crore at a floating rate linked to the policy repo rate.

Equity Markets: Key equity indices ended with modest losses after a volatile session on Thursday. The Nifty ended below the 11,900 mark. Markets witnessed volatility due to expiry of weekly index options on the NSE. Investors booked profits after the Sensex rose 2.46% and the Nifty climbed 2.20% in the previous four consecutive sessions.

Corporate News: Coal India Ltd's fuel allocation under the exclusive e-auction scheme for the non-power sector rose almost six-time to 13.44 million tonnes (MT) in April-September this fiscal. The Indian media and entertainment (M&E) industry's long-term outlook remains good. As per PwC's Entertainment & Media Outlook 2020-2024, the Indian M&E industry is expected to grow at 10.1% CAGR to reach \$55 billion by 2024. Tech Mahindra, Nestle India, Yes Bank, ICICI Lombard General Insurance Company, IDBI Bank, JSW Steel, Aarti Drugs, Persistent Systems, Premier Explosives, Rane Engine Valve will be watched ahead of earnings today.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	287.9	142.9	91.6
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)	56,858	55,209	55,784
F&O(INR cr)	5,274,740	2,702,358	1,811,286

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.1	27.4	29.9
NSE VIX	22.6	21.0	28.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,484	(0.6) %	34.5 %	Energy	14,789	1.0 %	37.3 %
IT	21,414	(0.8) %	77.8 %	Pharma	11,545	(0.9) %	64.3 %
Metals	2,433	0.7 %	56.6 %	Finance	11,921	(0.4) %	33.3 %
Auto	7,864	(0.2) %	68.8 %	PSU	1,314	(0.0) %	2.4 %
FMCG	29,715	0.1 %	12.7 %	Real Estate	238	0.4 %	38.1 %

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>
Adani Gree	727	5.0 %	375.4 %	SBI Cards	852	(4.8) %	40.1 %
Petronet L	236	4.9 %	17.8 %	IndusInd B	609	(3.1) %	77.9 %
Oracle Fin	3,368	4.2 %	75.3 %	Hero Motoc	3,082	(3.0) %	87.9 %
NTPC	85	2.9 %	4.5 %	Aurobindo	782	(3.0) %	99.4 %
Bharti Air	431	2.8 %	2.2 %	Info Edg.(3,398	(2.7) %	68.7 %

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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