



24 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,132	(0.2) %	34.9 %
BSE SENSEX	37,668	(0.2) %	33.3 %
CNX BANK	21,179	0.2 %	16.3 %
CNX MIDCAP	16,453	(0.3) %	43.4 %
CNX SMALLCAP	5,658	0.0 %	59.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,763	(1.9) %	(6.2) %
S&P 500	3,237	(2.4) %	0.2 %
FTSE 100	5,899	1.2 %	(22.4) %
HANG SENG	23,743	0.1 %	(16.8) %
NIKKEI	23,346	(0.1) %	0.6 %
SHANGHAI COMPOSITE	3,280	0.2 %	6.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.43	(0.0) %	3.1 %
EUR/USD	1.17	(0.9) %	4.6 %
GBP/USD	1.28	(1.1) %	(3.1) %
USD/JPY	104.74	0.2 %	(3.6) %
USD/AUD	1.39	1.3 %	(2.5) %
USD/SGD	1.36	0.3 %	1.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	0.8 %	(34.7) %
Gold(INR/10g)	50,251	(0.7) %	28.9 %
Gold Comex(USD/oz)	1,864	(2.0) %	20.8 %
SILVER(INR/1Kg)	58,211	(2.2) %	26.4 %
Aluminium(USD/MT)	1,719	(1.5) %	(3.0) %
Copper(USD/MT)	6,726	(1.2) %	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	0.7	0.0 %	(1.3) %

Global Economy: IHS Markit said its flash US Composite PMI Output Index eased to 54.4 this month from 54.6 in August. A reading above 50 indicates growth in private sector output. Though the private sector continues to expand, the dip in the index reflects that the economy's momentum was moderating. The Euro area private sector stagnated in September as rebound faltered, flash survey data from IHS Markit showed Wednesday. The composite output index dropped to 50.1 in September from 51.9 in August. The PMI has indicated a near stalling of the economy as rising infection rates and ongoing social distancing measures curbed demand. Manufacturing output growth rose in September to the fastest since February 2018, while services saw the largest contraction of output since May. The reading is at 53.7, the manufacturing Purchasing Managers' Index hit a 25-month high. The services Purchasing Managers' Index fell to a four-month low of 47.6. German forward-looking consumer sentiment index rose to -1.6 in October from -1.7 in September, survey data from the market researcher GfK showed Wednesday. While economic and income expectations were on the rise, propensity to buy has taken a hit. Consumers assessed that the largest euro area economy is clearly on the road to recovery. Japan manufacturing sector continued to contract in September, with a manufacturing PMI score of 47.3, the latest survey from Jibun Bank revealed. Australia's private sector recovered at the end of the third quarter after the coronavirus containment measures were loosened in parts of the country, flash survey data from IHS Markit showed Wednesday. The flash composite output index rose to 50.5 in September from 49.4 in August.

Global Equities: US stocks saw heavy selling pressure yet again amid worries over economic front. The US President Donald Trump announced a new series of economic sanctions on Cuba. This also hurt the market mood. DOW tanked near seven week low.

Indian Economy: A Reserve Bank of India working paper said that the consumer price index (CPI) should continue as the anchor for the monetary policy and interest rate decisions despite the fact that food accounts for nearly half of the weight in CPI in India. The Lok Sabha on Wednesday passed the The Major Ports Authorities Bill, 2020 that sought to provide autonomy to India's 12 major ports and improve their efficiency and competitiveness.

Equity Markets: Domestic equity benchmarks ended with small losses after a volatile session on Wednesday. The Nifty regained 11,100 mark after falling below that level in intraday moves. The indices were volatile ahead of the monthly F&O expiry on Thursday.

Corporate News: TCS and Yale University developed secure, private off-grid networking platform using blockchain. Coal India Ltd has finalised contracts for heavy earth moving equipment worth over Rs 5,900 crore to ramp up production, its Chairman Pramod Agrawal said on Wednesday, media reports noted. NLC India said the company issued commercial papers to State Bank of India.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(241.5)	33.2	101.2
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)	60,335	59,947	56,289
F&O(INR cr)	2,561,103	2,141,043	1,683,232

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.6	28.1	30.3
NSE VIX	21.0	21.2	29.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,179	0.2 %	16.3 %	Energy	14,957	(0.7) %	38.8 %
IT	19,806	(0.3) %	64.4 %	Pharma	11,686	(1.6) %	66.3 %
Metals	2,205	(0.4) %	41.9 %	Finance	10,427	0.1 %	16.6 %
Auto	7,691	(0.1) %	65.1 %	PSU	1,290	(1.5) %	0.6 %
FMCG	29,322	0.0 %	11.2 %	Real Estate	212	0.8 %	23.0 %

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>
Page Indus	19,375	5.4 %	16.6 %	Bharti Air	434	(7.9) %	3.0 %
Interglobe	1,283	3.9 %	28.4 %	Bharti Inf	167	(7.5) %	7.6 %
Bajaj Hold	2,495	3.8 %	42.2 %	Shriram Tr	613	(4.3) %	0.8 %
Muthoot Fi	1,045	3.0 %	72.9 %	Tata Steel	361	(3.4) %	35.6 %
Bosch	12,749	2.9 %	38.0 %	NTPC	85	(3.0) %	5.1 %

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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