



25 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,928	1.1 %	32.4 %
BSE SENSEX	36,554	(3.0) %	30.8 %
CNX BANK	20,457	0.0 %	12.3 %
CNX MIDCAP	16,040	0.0 %	39.8 %
CNX SMALLCAP	5,512	0.0 %	55.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,815	0.2 %	(6.0) %
S&P 500	3,247	0.3 %	0.5 %
FTSE 100	5,823	(1.3) %	(23.4) %
HANG SENG	23,311	(1.8) %	(18.3) %
NIKKEI	23,088	(1.1) %	(0.5) %
SHANGHAI COMPOSITE	3,223	(1.7) %	4.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.53	0.1 %	3.3 %
EUR/USD	1.17	(1.0) %	4.2 %
GBP/USD	1.27	(1.1) %	(3.5) %
USD/JPY	105.20	0.7 %	(3.2) %
USD/AUD	1.41	2.1 %	(1.4) %
USD/SGD	1.37	0.7 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	0.8 %	(34.7) %
Gold(INR/10g)	49,638	(1.2) %	27.3 %
Gold Comex(USD/oz)	1,864	(2.0) %	20.8 %
SILVER(INR/1Kg)	56,206	(3.4) %	22.0 %
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: The global economic outlook is less bleak than in June, an IMF spokesman said Thursday, according to media reports. The recent incoming data suggests that the outlook may be somewhat less dire than at the time of the (World Economic Outlook) update released in June. The Commerce Department said new home sales soared by 4.8% to an annual rate of 1.011 million in August after skyrocketing by 14.7% to an upwardly revised rate of 965,000 in July. The US Labor Department said US initial jobless claims inched up to 870,000, an increase of 4,000 from the previous week's revised level of 866,000. German business confidence index rose to 93.4 in September from 92.5 in August, reports said citing survey data from ifo Institute on Thursday. Firms' assessment of current situation as well as their expectations improved from the previous month. The current conditions index climbed to 89.2 from 87.9 in the previous month. The expected reading was 89.5. The expectations index rose to 97.7 in September from 97.2 a month ago. Swiss National Bank retained the policy rate and interest on sight deposits at the SNB at a record low -0.75%. The central bank continued to supply the banking system with generous amounts of liquidity via the SNB COVID-19 refinancing facility, or CRF. Bank Of Japan noted in its latest monetary policy meeting minutes that the bank would closely monitor the impact of COVID-19 and not hesitate to take additional easing measures if necessary. Based on this, most members shared the view that, as for policy rates, it would expect short- and long-term interest rates to remain at their present or lower levels.

Global Equities: US stocks saw a choppy movement though some buying was visible after the deep losses this week.

Indian Economy: The Centre has extended by three months the suspension of insolvency proceedings initiation against the corporate debtor for defaults arising post March 25, when the Covid-19-induced lockdown was announced. The Reserve Bank Of India (RBI) reported yesterday that currency in circulation eased 0.20% on the week to stand at Rs 26.90 lakh crore as on September 18th 2020. The central bank stated further that the overall reserve money rose by 0.40% on the week to Rs 32.20 lakh crore. Currency in circulation rose around 23.10% on a year ago basis compared to 12.4% growth at the same time last year.

Equity Markets: The local benchmark indices crashed on Thursday, extending losses to the sixth day amid a global selloff. The trading was volatile due to the F&O expiry. The mid-cap index has corrected 7.41% in four sessions while the small-cap index has fallen 8.18% in six sessions.

Corporate News: IT counters could be supported on sliding Indian Rupee which closed at 73.89 in last session, down 32 basis points on the day. INR almost tested 74 mark, registering its one month low. ONGC said that the company is set to soon resume operations in Hazira plant after the fire. Mahindra & Mahindra has raised stake in Sampo Rosenlew to 74.97% from 49.14%.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(527.3)	0.3	95.9
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)	61,639	60,046	56,334
F&O(INR cr)	4,302,566	2,261,128	1,704,880

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.6	28.1	30.3
NSE VIX	23.5	21.3	29.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,457	(3.4) %	12.3 %	Energy	14,548	(2.7) %	35.1 %
IT	18,973	(4.2) %	57.5 %	Pharma	11,335	(3.0) %	61.3 %
Metals	2,112	(4.2) %	35.9 %	Finance	10,135	(2.8) %	13.3 %
Auto	7,419	(3.5) %	59.3 %	PSU	1,240	(3.9) %	(3.3) %
FMCG	29,045	(0.9) %	10.2 %	Real Estate	205	(3.1) %	19.2 %

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	617	4.9 %	303.5 %	IndusInd B	490	(7.2) %	43.2 %
Godrej Con	692	1.9 %	26.0 %	Interglobe	1,197	(6.7) %	19.8 %
Colgate-Pa	1,374	1.5 %	10.6 %	Bajaj Fina	3,029	(6.6) %	36.5 %
Alkem Lab	2,788	1.5 %	22.8 %	Tata Motor	123	(6.5) %	80.7 %
ICICI Pru	414	1.4 %	20.9 %	M & M	575	(6.1) %	110.8 %

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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