



25 Nov.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,055	0.0 %	58.2 %
BSE SENSEX	44,523	1.0 %	57.7 %
CNX BANK	29,737	0.0 %	63.3 %
CNX MIDCAP	19,352	0.0 %	68.7 %
CNX SMALLCAP	6,380	0.0 %	80.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,046	1.5 %	5.3 %
S&P 500	3,635	1.6 %	12.5 %
FTSE 100	6,432	1.6 %	(15.4) %
HANG SENG	26,588	0.4 %	(6.9) %
NIKKEI	26,166	2.5 %	12.8 %
SHANGHAI COMPOSITE	3,403	(0.3) %	10.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.05	(0.0) %	4.0 %
EUR/USD	1.19	0.2 %	5.8 %
GBP/USD	1.33	0.7 %	1.1 %
USD/JPY	104.02	0.1 %	(4.3) %
USD/AUD	1.37	(0.4) %	(4.0) %
USD/SGD	1.34	(0.2) %	(0.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	4.3 %	(26.6) %
Gold(INR/10g)	48,958	(2.4) %	25.5 %
Gold Comex(USD/oz)	1,816	(1.5) %	17.7 %
SILVER(INR/1Kg)	59,701	(2.8) %	29.6 %
Aluminium(USD/MT)	1,965	(0.3) %	10.9 %
Copper(USD/MT)	7,302	1.2 %	18.4 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.9	0.0 %	(1.0) %

**Global Economy:** The US home prices saw a strong spike, jumping 7% annually in September, up from a 5.8% annual gain in August, according to the S&P CoreLogic Case-Shiller US National Home Price NSA Index. That is the largest annual gain since September 2014. Prices are now nearly 23% higher than their last peak in 2006. The 10-City Composite was up 6.2% year over year, up from 4.9% in the previous month. The 20-City Composite posted a 6.6% gain, up from 5.3% in the previous month. German economy rebounded in the third quarter, offsetting a large part of the massive contraction in the second quarter, revised data from Destatis revealed on Tuesday. Gross domestic product grew 8.5% sequentially in the third quarter, following the 9.8% drop in the second quarter. The third quarter GDP rate was also revised up from 8.2% estimated on October 30. On a yearly basis, calendar-adjusted GDP was 4% lower than in the same period last year after the 11.3% contraction in the second quarter. German business confidence weakened in November, survey results from ifo institute showed Tuesday. The business climate index fell to 90.7 in November from revised 92.5 in the previous month. Australia's exports grew 6% month-on-month to A\$30.53 billion in October, preliminary data from the Australian Bureau of Statistics showed Tuesday. On a yearly basis, exports were down 3% in October.

**Global Equities:** US stocks continued to see strong gains with the DOW hitting above the critical 30000 mark as risk appetite stayed firm.

**Indian Economy:** Commerce and industry minister Piyush Goyal on Tuesday said the economy is showing strong signals of comeback and India is being seen as a trusted partner globally with the country's reputation having improved. More than 40 lakh new subscribers have been enrolled under the Atal Pension Yojana (APY), government's pension scheme, so far this fiscal year. With the new additions, the total enrolments under the APY have crossed 2.63 crore, said the Pension Fund Regulatory and Development Authority (PFRDA) in the release.

**Equity Markets:** Domestic indices closed at record high level on Tuesday, tracking positive global cues. The Nifty closed above the 13,050 level on broader buying support. All the sectoral indices on the NSE ended in the green. The barometer index, the S&P BSE Sensex, rose 445.87 points or 1.01% at 44,523.02. The Nifty 50 index advanced 128.70 points or 1% at 13,055.15. Both the indices attained record closing high levels.

**Corporate News:** JSW Steel has entered into a legally binding share purchase agreement to acquire the remaining 26.45% stake of JSW Vallabh Tinplate for a total sum of Rs 35 crore from the existing third party shareholders as it will add strategic value. Max Financial Services reported a profit of Rs 81 crore in Q2FY21 compared to Rs 64.4 crore while the company's revenue increased to Rs 7,020 crore from Rs 4,686 crore YoY. Local oil marketing companies could be in focus as global crude oil prices hit eight month high in last session.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	659.5	489.9	128.9
MF(INR cr)	(88.4)	(1,223.7)	(340.1)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	70,107	65,368	56,790
F&O(INR cr)	2,051,383	2,598,621	1,917,195

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.5	26.3	29.9
NSE VIX	21.1	21.0	27.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,737	2.5 %	63.3 %	Energy	16,461	0.3 %	52.8 %
IT	22,064	0.3 %	83.2 %	Pharma	11,881	1.2 %	69.1 %
Metals	2,839	1.1 %	82.8 %	Finance	14,275	1.5 %	59.6 %
Auto	8,888	1.7 %	90.8 %	PSU	1,483	1.1 %	15.6 %
FMCG	31,832	0.8 %	20.8 %	Real Estate	258	1.8 %	50.1 %

### 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>
Bosch	12,980	9.8 %	40.5 %	Bajaj Hold	3,093	(4.7) %	76.3 %
General In	137	5.0 %	30.2 %	ACC	1,697	(1.7) %	76.1 %
Adani Port	392	4.6 %	60.2 %	Muthoot Fi	1,138	(1.6) %	88.2 %
Axis Bank	620	4.0 %	72.8 %	Titan Comp	1,327	(1.5) %	41.8 %
Eicher Mot	2,693	3.7 %	107.2 %	H D F C	2,218	(1.5) %	40.1 %

### 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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