



26 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,930	0.3 %	44.5 %
BSE SENSEX	40,686	0.3 %	43.9 %
CNX BANK	24,478	(0.0) %	34.4 %
CNX MIDCAP	17,306	0.8 %	50.9 %
CNX SMALLCAP	5,994	0.6 %	69.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,336	(0.1) %	(0.7) %
S&P 500	3,465	0.3 %	7.3 %
FTSE 100	5,860	1.3 %	(22.9) %
HANG SENG	24,919	0.5 %	(12.7) %
NIKKEI	23,517	0.2 %	1.3 %
SHANGHAI COMPOSITE	3,278	(1.0) %	6.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.53	0.1 %	3.3 %
EUR/USD	1.18	(0.2) %	5.5 %
GBP/USD	1.31	0.3 %	(0.6) %
USD/JPY	104.75	(0.1) %	(3.6) %
USD/AUD	1.41	(0.1) %	(1.3) %
USD/SGD	1.36	0.1 %	0.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	(1.9) %	(34.9) %
Gold(INR/10g)	51,044	(0.2) %	30.9 %
Gold Comex(USD/oz)	1,913	0.7 %	24.0 %
SILVER(INR/1Kg)	62,578	0.0 %	35.9 %
Aluminium(USD/MT)	1,829	0.1 %	3.2 %
Copper(USD/MT)	6,880	(0.1) %	11.6 %

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: Euro area private sector returned to negative territory for the first time since June as accelerating growth of manufacturing was offset by a sharp deterioration in the service sector amid rising Covid-19 worries, flash survey data from IHS Markit showed Friday. The composite output index fell to a four-month low of 49.4 in October from 50.4 in September. A score below 50 indicates contraction. Euro area manufacturing output growth accelerated to the fastest since February 2018, while the service sector output fell for a second successive month, deteriorating at the sharpest rate since May. The manufacturing Purchasing Managers' Index rose to a 26-month high of 54.4 from 53.7 a month ago. Meanwhile, the services PMI declined to 46.2 from 48.0 in the previous month. This was the lowest reading in five months. UK retail sales grew 1.5% month-on-month in September, preliminary data from the Office for National Statistics showed on Friday. The growth for August was revised up to 0.9% from 0.8%. On a year-on-year basis, retail sales increased 4.7% in September following a revised 2.7% growth in the previous month. Japan manufacturing sector continued to contract in October, the latest survey from Jibun Bank revealed on Friday with a manufacturing PMI score of 48.0, That's up 47.7 in September, although it remain beneath the boom-or-bust line of 50 that separates expansion from contraction. Business expectations about the year ahead outlook remained positive. The report also showed that the services index fell to 46.6 from 46.9 and the composite index rose to 46.7 from 46.6.

Global Equities: DOW continued to face selling pressure on rallies amid escalating Covid-19 worries on both sides of Atlantic.

Indian Economy: VK Saraswat, Member, NITI Aayog said that there is a need for a well-developed non-ferrous metals industry in India as it provides important raw material to many industries which are the backbone of economic development. With increasing usage of these metals in several existing as well as emerging applications coupled with new technologies, a paradigm shift can be expected that can change the way non-ferrous metals will be produced and consumed in the future, he added. The Centre has borrowed and transferred Rs 6,000 crore as the first tranche of GST compensation shortfall to 16 states and two union territories, including Maharashtra, Gujarat, Bihar, Assam, Delhi and J&K, the finance ministry said on Friday. Last week, the Centre gave in to the demands of opposition-ruled states to borrow and fund the GST compensation shortfall.

Equity Markets: Domestic equity benchmarks ended with decent gains after a volatile trade on Friday. Auto stocks were in demand. The barometer index, the S&P BSE Sensex advanced 127.01 points or 0.31% at 40,685.50. The Nifty 50 index gained 33.90 points or 0.28% at 11,930.35.

Corporate News: Banking stocks will be in focus as the government late Friday on announced waiver of interest on interest for loans up to Rs 2 crore irrespective of whether moratorium was availed or not. The Department of Financial Services came out with operational guidelines in the backdrop of Supreme Court's direction to implement the interest waiver scheme. Tech Mahindra reported higher profit at Rs 1,064.6 crore in Q2FY21 against Rs 972.3 crore, revenue rose to Rs 9,371.8 crore from Rs 9,106.3 crore QoQ. Subsidiary Tech Mahindra (Singapore) Pte Ltd agreed to acquire 100% stake in Momenton Pty. Ltd, Tenzing Ltd and Tenzing Australia Ltd. Bharat Petroleum Corporation Ltd (BPCL), which controls around 12 per cent of the lubes market with its Mak-branded lubricants, will launch two high-grade synthetic lubes for premium cars and bikes, media reports noted. Nestle company reported profit at Rs 587 crore in Q3CY20 against Rs 595.3 crore, revenue increased to Rs 3,541.7 crore versus Rs 3,215.8 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	166.4	144.5	92.2
MF(INR cr)	(1,349.6)	(794.2)	(254.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	52,328	55,029	55,759
F&O(INR cr)	1,164,475	2,606,240	1,806,699

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.6	27.4	29.9
NSE VIX	21.8	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	24,478	(0.0) %	34.4 %	Energy	14,902	0.8 %	38.3 %
IT	21,524	0.5 %	78.7 %	Pharma	11,503	(0.4) %	63.7 %
Metals	2,443	0.4 %	57.3 %	Finance	11,947	0.2 %	33.6 %
Auto	8,095	2.9 %	73.8 %	PSU	1,320	0.5 %	2.8 %
FMCG	29,782	0.2 %	13.0 %	Real Estate	235	(1.1) %	36.6 %

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>
Info Edg.(3,645	7.3 %	81.0 %	SBI Cards	807	(5.2) %	32.8 %
Maruti Suz	7,103	4.3 %	67.3 %	Biocon	417	(2.9) %	49.9 %
Motherson	110	4.2 %	90.6 %	Container	386	(2.6) %	21.4 %
M & M	625	3.4 %	129.1 %	Ambuja Cem	247	(2.4) %	57.9 %
Bosch	12,213	3.4 %	32.2 %	UltraTech	4,505	(2.4) %	43.4 %

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					

..... End of Report