



26 Nov.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,858	(1.5) %	55.8 %
BSE SENSEX	43,828	(1.6) %	55.1 %
CNX BANK	29,196	(1.8) %	60.3 %
CNX MIDCAP	19,033	(1.7) %	65.9 %
CNX SMALLCAP	6,323	(0.9) %	78.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,872	(0.6) %	4.7 %
S&P 500	3,630	(0.2) %	12.3 %
FTSE 100	6,391	(0.6) %	(16.0) %
HANG SENG	26,670	0.3 %	(6.6) %
NIKKEI	26,297	0.5 %	13.3 %
SHANGHAI COMPOSITE	3,362	(1.2) %	9.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.94	(0.0) %	3.8 %
EUR/USD	1.19	0.1 %	5.8 %
GBP/USD	1.33	0.5 %	1.2 %
USD/JPY	104.51	0.6 %	(3.8) %
USD/AUD	1.36	(0.5) %	(4.4) %
USD/SGD	1.34	(0.1) %	(0.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	1.8 %	(25.3) %
Gold(INR/10g)	48,947	(0.0) %	25.5 %
Gold Comex(USD/oz)	1,817	0.0 %	17.8 %
SILVER(INR/1Kg)	60,305	1.0 %	30.9 %
Aluminium(USD/MT)	1,967	0.1 %	11.0 %
Copper(USD/MT)	7,239	(0.9) %	17.4 %

**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 minutes of the latest US Federal Reserve Monetary Policy meeting were announced yesterday. Participants noted that the COVID-19 pandemic was causing tremendous human and economic hardship across the United States and around the world. Economic activity and employment had continued to recover but remained well below their levels at the beginning of the year. In their discussion regarding the role of the Committee's asset purchases, participants noted that these purchases have supported and sustained smooth market functioning and helped foster accommodative financial conditions. With market functioning seen as having largely recovered, many participants indicated that the role of asset purchases had shifted more toward fostering accommodative financial conditions for households and businesses to support the Committee's employment and inflation goals. The US initial jobless claims rose to 778,000, an increase of 30,000 from the previous week's revised level of 748,000. Vulnerabilities in the corporate sector are increasing as the pandemic evolves and their unearthing could test the resilience of euro area banks in the future, the European Central Bank (ECB) stated in its latest Financial Stability Review (FSR). Current extensive policy support is helping euro area corporates and households to cope with the fallout of the pandemic, but risks can arise either from a premature end to measures or from prolonged support. Premature withdrawal of fiscal support - including government loan guarantees and statutory loan moratoria - could set back the economic recovery, transforming the corporate liquidity challenges observed at the outset of the pandemic turn into solvency issues. Japan's services producer price index fell 0.6% on a yearly basis in October, reversing a 1.4% rise in September, data from the Bank of Japan showed on Wednesday. Month-on-month, producer price inflation eased to 0.1% in October from 0.2% in the previous month.

**Global Equities:** DOW flipped back yesterday as market turned lower after hitting all time highs. Continued surge in US Covid-19 cases weighed on the sentiments.

**Indian Economy:** Reserve Bank released Quarterly Statistics on Deposits and Credit of Scheduled Commercial Banks (SCBs) today. Bank credit growth (Y-o-Y) decelerated to 5.8% in September 2020 from 8.9% a year ago: the deceleration was recorded across the population groups (i.e., rural, semi-urban, urban and metropolitan). Annual growth (Y-o-Y) in credit by private sector banks moderated significantly to 6.9% in September 2020 from 14.4% a year ago, whereas it increased marginally for public sector banks to 5.7% from 5.2% over the same period.

**Equity Markets:** The equity benchmark indices corrected sharply and ended with heavy losses on Wednesday. The Nifty after opening above 13,100 level succumbed to selling pressure and ended near 12,850 mark. PSU banks advanced in a broader market correction.

**Corporate News:** Siemens company reported profit at Rs 330.2 crore in Q4FY20 compared to Rs 333.9 crore while the company's revenue fell to Rs 3,546.8 crore from Rs 3,894.4 crore YoY. Continued firm undertone in Indian Rupee could hurt the local IT companies. The Securities and Exchange Board of India has withdrawn a proposal to increase the margin requirement for non-futures and options (F&O) stocks in the cash market.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	747.0	506.0	132.8
MF(INR cr)	(1,831.4)	(1,416.6)	(375.5)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	71,389	65,703	56,880
F&O(INR cr)	3,891,690	2,670,458	1,929,235

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.7	26.0	29.8
NSE VIX	23.1	21.1	27.3

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,196	(1.8) %	60.3 %	Energy	16,388	(0.4) %	52.1 %
IT	21,706	(1.6) %	80.2 %	Pharma	11,635	(2.1) %	65.6 %
Metals	2,817	(0.8) %	81.3 %	Finance	14,012	(1.8) %	56.7 %
Auto	8,738	(1.7) %	87.6 %	PSU	1,510	1.8 %	17.7 %
FMCG	31,442	(1.2) %	19.3 %	Real Estate	253	(2.2) %	46.7 %

### 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>
ONGC	81	6.2 %	22.9 %	L & T Info	3,108	(6.8) %	123.3 %
Bank of Ba	49	4.7 %	(4.3) %	Bajaj Hold	2,929	(5.3) %	66.9 %
Punjab Nat	31	3.1 %	3.0 %	Adani Gree	1,145	(5.0) %	648.8 %
Bandhan Ba	368	2.6 %	88.9 %	Interglobe	1,591	(4.0) %	59.2 %
GAIL (Indi	102	2.0 %	35.0 %	Eicher Mot	2,595	(3.6) %	99.6 %

### 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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