



27 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,768	0.0 %	42.6 %
BSE SENSEX	40,146	(1.3) %	42.0 %
CNX BANK	24,075	0.0 %	32.2 %
CNX MIDCAP	17,010	0.0 %	48.3 %
CNX SMALLCAP	5,933	0.0 %	67.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,685	(2.3) %	(3.0) %
S&P 500	3,401	(1.9) %	5.3 %
FTSE 100	5,792	(1.2) %	(23.8) %
HANG SENG	24,919	0.5 %	(12.7) %
NIKKEI	23,494	(0.1) %	1.2 %
SHANGHAI COMPOSITE	3,251	(0.8) %	5.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.64	0.3 %	3.4 %
EUR/USD	1.19	0.0 %	5.7 %
GBP/USD	1.30	(0.3) %	(1.1) %
USD/JPY	104.76	(0.1) %	(3.6) %
USD/AUD	1.40	(0.5) %	(1.7) %
USD/SGD	1.36	0.3 %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	39	(3.2) %	(37.0) %
Gold(INR/10g)	51,048	0.0 %	30.9 %
Gold Comex(USD/oz)	1,907	(0.3) %	23.6 %
SILVER(INR/1Kg)	61,556	(1.6) %	33.7 %
Aluminium(USD/MT)	1,823	(0.4) %	2.8 %
Copper(USD/MT)	6,806	(1.1) %	10.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.8	(0.0) %	(1.1) %

Global Economy: The new home sales in the US recorded showed a sharp decrease in the month of September, according to a report released by the Commerce Department on Monday. The report said new home sales tumbled by 3.5% to an annual rate of 959,000 in September after jumping by 3 percent to a revised rate of 994,000 in August. The German economic recovery is likely to continue in the current quarter, albeit at a much slower pace, Bundesbank said in its monthly report on Monday. The central bank said economic output is likely to have risen sharply in the third quarter. German business sentiment weakened in October, reports said citing survey data from ifo Institute on Monday. The business climate index fell to 92.7 in October from revised 93.2 in September. Assessment of current situation as well as expectations fell in October. After the unprecedented hit to economic activity in emerging market economies from the COVID-19 pandemic, their economic output is projected to shrink by 3.3% in 2020, the International Monetary Front (IMF) noted in a latest blog post. Central banks across emerging markets responded swiftly and forcefully with an unprecedented response of their own. They did this by using a variety of policy tools and, to a great extent, helped stabilize markets and keep them functioning. Japan's leading index edged up in August, final data from the Cabinet Office showed on Monday. The leading index, which measures the future economic activity, rose to 88.4 in August from 86.7 in July. This was slightly lower than initial estimate of 88.8. The coincident index rose to 79.2 in August versus 79.4 in the initial estimate. The lagging index slipped to 91.4 in August from 92.3 in the prior month. According to the initial estimate, the reading was 89.7.

Global Equities: US stocks tanked. The new coronavirus cases have soared and lawmakers in Washington appear to remain at an impasse over a new stimulus bill.

Indian Economy: The government on Monday said it has decided to extend the validity of licence for import of Tur till December 31 this year. In the ongoing Kharif Marketing Season (KMS) 2020-21, Government continues to procure Kharif 2020-21 crops at its MSP from farmers as per its existing MSP Schemes, as was done in previous seasons. Paddy procurement for Kharif 2020-21 has gained good momentum in the procuring States and UTs of Punjab, Haryana, UP, TN, Uttarakhand, Chandigarh, J&K, Gujarat and Kerala with purchase of over 144.59 LMTs of paddy upto 24.10.2020 against the last year corresponding purchase of 117.55 LMT which is an increase of 23 % over last year.

Equity Markets: Domestic shares went on a southward spiral on Monday amid a broader selloff. Global cues were weak as fresh COVID concerns and fading hopes for more US fiscal stimulus before the presidential election weighed on the market sentiments. The barometer index, the S&P BSE Sensex slumped 540 points or 1.33% at 40,145.50. The Nifty 50 index fell 162.60 points or 1.36% at 11,767.75. Auto and metal shares lead the decline.

Corporate News: The state-run NBCC will prepare the monetisation plan for land parcels of Delhi Transport Corporation (DTC). Finolex Industries has reported a higher profit at Rs 122.8 crore in Q2FY21 against Rs 102.3 crore while revenue increased to Rs 585.8 crore from Rs 576.7 crore on YoY basis. NTPC said the company will consider share buyback on November 2.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	145.6	144.6	92.5
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)	52,312	54,869	55,735
F&O(INR cr)	1,829,728	2,560,563	1,806,861

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	32.5	27.7	29.9
NSE VIX	22.8	21.1	28.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,075	(1.6) %	32.2 %	Energy	14,613	(1.9) %	35.7 %
IT	21,266	(1.2) %	76.5 %	Pharma	11,334	(1.5) %	61.3 %
Metals	2,358	(3.5) %	51.8 %	Finance	11,828	(1.0) %	32.3 %
Auto	7,834	(3.2) %	68.2 %	PSU	1,304	(1.2) %	1.6 %
FMCG	29,775	(0.0) %	13.0 %	Real Estate	231	(1.9) %	34.0 %

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>
HDFC Life	579	2.5 %	34.6 %	Hero Motoc	2,898	(6.8) %	76.7 %
Nestle Ind	16,259	2.5 %	3.9 %	Bajaj Auto	2,895	(6.1) %	41.2 %
Kotak Mah.	1,417	2.4 %	19.9 %	Hindalco I	172	(5.4) %	88.1 %
Punjab Nat	28	2.2 %	(8.0) %	M & M	597	(4.5) %	118.9 %
Bajaj Hold	2,297	1.6 %	30.9 %	H P C L	174	(4.4) %	(5.2) %

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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