



27 Nov.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,987	1.0 %	57.3 %
BSE SENSEX	44,260	1.0 %	56.6 %
CNX BANK	29,550	1.2 %	62.3 %
CNX MIDCAP	19,196	0.9 %	67.3 %
CNX SMALLCAP	6,377	0.9 %	80.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,872	(0.6) %	4.7 %
S&P 500	3,630	(0.2) %	12.3 %
FTSE 100	6,363	(0.4) %	(16.3) %
HANG SENG	26,819	0.6 %	(6.0) %
NIKKEI	26,537	0.9 %	14.4 %
SHANGHAI COMPOSITE	3,370	0.2 %	9.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.94	(0.1) %	3.8 %
EUR/USD	1.19	0.0 %	5.8 %
GBP/USD	1.33	0.1 %	1.2 %
USD/JPY	104.51	0.5 %	(3.8) %
USD/AUD	1.36	(0.4) %	(4.4) %
USD/SGD	1.34	0.0 %	(0.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	1.8 %	(25.3) %
Gold(INR/10g)	48,965	0.0 %	25.6 %
Gold Comex(USD/oz)	1,817	0.0 %	17.8 %
SILVER(INR/1Kg)	60,258	(0.1) %	30.8 %
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: Eurozone monetary aggregate M3 expanded 10.5% on a yearly basis in October, slightly faster than the 10.4% rise posted in September, data released by the European Central Bank showed Thursday. At the same time, the annual rise in narrow measure, M1, remained unchanged at 13.8% in October. As regards the dynamics of credit, data showed that annual growth in credit to the private sector held steady at 4.9% in October. German consumer sentiment dampens due to the partial lockdown, survey results from the market research group GfK showed Thursday. The forward-looking consumer sentiment index fell to -6.7 in December from revised -3.2 in October. All sub-components of the confidence index weakened in November. The economic expectation indicator fell by 7.3 points to -0.2 in November. This was the lowest figure since May. The income expectations index declined 5.2 to 4.6 in November. UK car production recorded a double-digit slide in October, the Society of Motor Manufacturers & Traders said Thursday. Car production plummeted 18.2% on year in October to 110,179 units in October. Due to the impact of coronavirus and fresh lockdowns at home and abroad, production for domestic market decreased 13.6% from the last year and that for foreign market dropped by 19.1%. During January to October period, output fell by -33.8% with 379,308 fewer cars made than same period in 2019. Japan's Cabinet Office said Japanese economy is still in a severe situation due to the novel coronavirus, but it is showing movements of picking up.

Global Equities: US stocks were closed on Thanksgiving Day Holiday. European markets ended on flat note. Overall trend remained choppy as US Covid-19 cases continued to soar.

Indian Economy: According to the latest edition of State Bank Of India's Ecwrap, surplus domestic liquidity as given by outstanding Net LAF stands at Rs 5276 billion as on 22 Nov, with average surplus being Rs 4150 billion so far in the current fiscal. One factor which is increasing market liquidity is RBI's dollar purchases to prevent further appreciation of Rupee. Amitabh Kant, CEO, NITI Aayog today said that India is uniquely positioned in the global landscape and has the potential to become the leading force in the new world order. India can create up to \$1 trillion of the economic value by digital economy by 2025 with half of the opportunities originating in new digital ecosystems that can spring up in diverse sectors of the economy, he noted.

Equity Markets: Equity indices bounced off day's lows and ended with strong gains on Thursday. The Nifty briefly crossed the 13,000 mark. The recovery was backed by firmness in metal, pharma and banks stocks. All the sectoral indices on the NSE ended in the green. The S&P BSE Sensex, jumped 431.64 points or 0.98% at 44,259.74. The Nifty 50 index spurted 128.60 points or 1% at 12,987.

Corporate News: Honda Motorcycle and Scooter India (HMSI) said it has launched a special edition of its scooter Activa 6G, with price starting at Rs 66,816 (ex-showroom Gurugram), to commemorate twenty years of the Activa brand in the country. Larsen and Toubro Construction, has bagged a Rs 3,000 crore contract to construct India's longest road bridge across river Brahmaputra connecting Dhubri in Assam to Phulbari in Meghalaya. AU Small Finance Bank: Bank made strategic investment of Rs 7.70 crore in NPCI, wherein 61,320 equity shares at book value of Rs 1,256 per share are allocated to the bank constituting around 0.44% shareholding of NPCI.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(180.8)	465.6	130.8
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)	64,208	65,624	56,924
F&O(INR cr)	7,257,499	2,911,881	1,961,528

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.7	26.0	29.8
NSE VIX	20.0	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	29,550	1.2 %	62.3 %	Energy	16,346	(0.3) %	51.7 %
IT	21,860	0.7 %	81.5 %	Pharma	11,801	1.4 %	67.9 %
Metals	2,925	3.9 %	88.3 %	Finance	14,238	1.6 %	59.2 %
Auto	8,768	0.3 %	88.2 %	PSU	1,539	1.9 %	19.9 %
FMCG	31,701	0.8 %	20.3 %	Real Estate	254	0.8 %	47.9 %

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>
Siemens	1,517	11.2 %	39.8 %	Adani Gree	1,104	(3.5) %	622.3 %
JSW Steel	359	6.2 %	151.2 %	Interglobe	1,544	(2.9) %	54.6 %
ICICI Lomb	1,457	5.4 %	31.8 %	Eicher Mot	2,549	(1.8) %	96.1 %
Tata Steel	568	5.0 %	113.4 %	Havells In	803	(1.5) %	65.7 %
Bank of Ba	51	4.3 %	(0.2) %	Bosch	12,777	(1.2) %	38.3 %

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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