



28 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,050	2.3 %	33.9 %
BSE SENSEX	37,389	2.3 %	32.3 %
CNX BANK	20,982	2.6 %	15.2 %
CNX MIDCAP	16,504	2.9 %	43.9 %
CNX SMALLCAP	5,655	2.6 %	59.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,174	1.3 %	(4.8) %
S&P 500	3,298	1.6 %	2.1 %
FTSE 100	5,843	0.3 %	(23.2) %
HANG SENG	23,235	(0.3) %	(18.6) %
NIKKEI	23,205	0.5 %	(0.0) %
SHANGHAI COMPOSITE	3,219	(0.1) %	4.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.75	0.3 %	3.6 %
EUR/USD	1.17	(0.2) %	4.0 %
GBP/USD	1.27	0.1 %	(3.4) %
USD/JPY	105.41	0.2 %	(3.0) %
USD/AUD	1.42	0.9 %	(0.5) %
USD/SGD	1.38	0.5 %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	(0.1) %	(34.2) %
Gold(INR/10g)	49,589	(0.1) %	27.2 %
Gold Comex(USD/oz)	1,871	0.4 %	21.3 %
SILVER(INR/1Kg)	57,323	2.0 %	24.5 %
Aluminium(USD/MT)	1,709	0.7 %	(3.6) %
Copper(USD/MT)	6,529	(0.1) %	5.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	(0.0) %	(1.3) %

Global Economy: The US Commerce Department released a report on Friday showing durable goods orders climbed much less than expected in the month of August. The Commerce Department said durable goods orders rose by 0.4% in August after soaring by an upwardly revised 11.7% in July. Eurozone money supply rose at a slower pace in August, the European Central Bank (ECB) reported Friday. The broad monetary aggregate M3 grew by 9.5% on a yearly basis, slower than the revised 10.1% increase seen in July. The ECB noted that annual growth rate of the narrower aggregate M1, which comprises currency in circulation and overnight deposits, fell to 13.2% from 13.5% in July. UK consumer confidence rose in September despite fears of a second wave of coronavirus infections, survey data from the market research group Gfk showed Friday. The consumer confidence index rose unexpectedly to -25 in September from -27 in August. UK car production fell sharply in August as ongoing coronavirus crisis stalled efforts to ramp up output, data from the Society of Motor Manufacturers and Traders or SMMT, showed Friday. The total output decreased 44.6% on a yearly basis in August to 51,039 units. South Korea's consumer confidence weakened in September for the first time in four months, survey data from the Bank of Korea showed on Friday. The composite consumer confidence index eased to 79.4 from 84.2 in August.

Global Equities: US stocks saw a solid rebound on Friday. DOW jumped 1.3% as talks of a fiscal stimulus gathered steam.

Indian Economy: Confederation of Indian Industry has appealed to the Reserve Bank of India to make some changes in the new guidelines for opening current accounts by banks issued last month. The industry body has urged the central bank to raise the thresholds for opening current accounts from Rs. 5 crore to Rs. 25 crore and from Rs. 50 crore to Rs. 100 crore.

Equity Markets: The domestic equity benchmarks surged on Friday amid value buying after a recent selloff. The Nifty managed to regain the 11,000 mark as banks and IT shares bounced. The barometer index, the S&P BSE Sensex, jumped 835.06 points or 2.28% at 37,388.66. The Nifty 50 index surged 244.70 points or 2.26% at 11,050.25. The 50-unit index tumbled 6.89% in the previous six sessions.

Corporate News: Agri related stocks could be in focus on excellent surge in sowing. The total acreage stands at record 1,117 lakh hectares under kharif crops, up nearly 5% over the 1,066 lakh hectares planted in the corresponding week last year. NALCO said that it signed MoU with Numaligarh refinery for long-term supply of CP coke. Central Bank of India closed its QIP by raising Rs 255 crore, set issue price at Rs 15.38 per share.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(225.3)	(12.3)	93.2
MF(INR cr)	(393.4)	(471.3)	(219.1)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	58,205	59,944	56,350
F&O(INR cr)	1,285,399	2,209,773	1,701,442

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.4	28.0	30.3
NSE VIX	20.7	21.3	29.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,982	2.6 %	15.2 %	Energy	14,826	1.9 %	37.6 %
IT	19,629	3.5 %	63.0 %	Pharma	11,596	2.3 %	65.0 %
Metals	2,173	2.9 %	39.9 %	Finance	10,332	1.9 %	15.5 %
Auto	7,670	3.4 %	64.7 %	PSU	1,276	2.9 %	(0.5) %
FMCG	29,634	2.0 %	12.4 %	Real Estate	209	2.1 %	21.7 %

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>
Bharti Inf	183	8.1 %	17.9 %	SBI Life I	797	(0.9) %	25.5 %
Bajaj Fins	5,803	7.0 %	28.9 %	Havells In	659	(0.8) %	36.0 %
Muthoot Fi	1,088	6.7 %	79.9 %	SBI Cards	812	(0.5) %	33.5 %
Motherson	110	5.7 %	89.6 %	B P C L	376	(0.4) %	24.0 %
Adani Tran	248	5.4 %	30.7 %	Siemens	1,208	(0.3) %	11.3 %

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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