



28 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,889	1.0 %	44.0 %
BSE SENSEX	40,522	0.9 %	43.4 %
CNX BANK	24,770	2.9 %	36.0 %
CNX MIDCAP	17,217	1.2 %	50.1 %
CNX SMALLCAP	5,951	0.3 %	68.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,463	(0.8) %	(3.8) %
S&P 500	3,391	(0.3) %	4.9 %
FTSE 100	5,729	(1.1) %	(24.7) %
HANG SENG	24,787	(0.5) %	(13.2) %
NIKKEI	23,486	(0.0) %	1.2 %
SHANGHAI COMPOSITE	3,254	0.1 %	5.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.80	0.4 %	3.6 %
EUR/USD	1.18	(0.1) %	5.4 %
GBP/USD	1.30	(0.6) %	(1.2) %
USD/JPY	104.88	0.1 %	(3.5) %
USD/AUD	1.40	(0.2) %	(1.5) %
USD/SGD	1.36	0.3 %	1.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	2.6 %	(35.3) %
Gold(INR/10g)	50,847	(0.4) %	30.4 %
Gold Comex(USD/oz)	1,908	0.1 %	23.7 %
SILVER(INR/1Kg)	61,689	0.2 %	33.9 %
Aluminium(USD/MT)	1,808	(0.8) %	2.0 %
Copper(USD/MT)	6,788	(0.3) %	10.1 %

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) %	(1.2) %

Global Economy: The US durable goods orders surged up by 1.9% in September after rising by rising by 0.4% in August. The S&P CoreLogic Case-Shiller 20-city home price index showed that home prices climbed 5.2% in August from a year earlier, accelerating from a 4.1% gain in July. The US Conference Board's Confidence Index was at 100.9 this month after it jumped to a downwardly revised 101.3 in September. China's industrial profits grew 10.1% on a yearly basis but slower than the 19.1% increase posted in August, data from the National Bureau of Statistics showed Tuesday. This was the fifth consecutive rise. The statistical office cited falling factory gate prices and rising raw material prices as major reason for the slowdown in industrial profits. During January to September period, industrial profits declined 2.4% from the same period last year. Eurozone money supply grew at a faster pace in September and loans to the private sector saw a steady growth, data published by the European Central Bank showed Tuesday. The broad monetary aggregate M3 expanded by 10.4% on a yearly basis, faster than the 9.5% gain in August. The growth in the narrow measure M1 accelerated to 13.8% from 13.2%. The annual growth rate of credit to the private sector slowed to 4.9% in September from 5% in August. South Korea's gross domestic product expanded a seasonally adjusted 1.9% on quarter in the third quarter of 2020, the Bank of Korea said in Tuesday's advance estimate. This followed the 3.2% decline in the three months prior.

Global Equities: DOW saw choppy moves after the tumble in last session. The coronavirus has strengthened its grip across much of the US with record numbers of cases.:

Indian Economy: Union Finance Minister Nirmala Sitharaman said that India's growth this year will be negative or near zero. Next year India can be one of the fastest growing economies. Festival season has commenced in India, as a result of which I expect the demand to go up and therefore, be sustainable also. India has achieved several significant milestones in its fight against COVID as the new confirmed cases have fallen below 36,500 (36,470) for the first time in three months. The new cases were 34,884 on 18th July, 2020. With a high number of COVID patients recovering every day and the sustained fall in the mortality rate, India's steady trend of registering dipping active cases continues. The active cases have drastically declined to 6.25 lakh.

Equity Markets: Key barometers ended with strong gains on Tuesday, supported by private banks and financial stocks. Shares advanced on hopes of higher inflows after MSCI said it will make changes to its global indexes following revisions in the country's foreign ownership limits.

Corporate News: Banking stocks will be in focus. The Reserve Bank of India (RBI) issued a notification directing banks to follow the government order reimbursing small borrowers with loans up Rs 2 crore that have paid compounded interest on their loans between March 1 and August 31. Tata Motors posted a consolidated net loss of 3.14 billion rupees (\$42.47 million) for the second quarter ended September 30, as retail sales at JLR, which accounts for a major portion of its profit, fell 12%. Total revenue from operations fell 18% to 535.3 billion rupees. ICICI Prudential Life Insurance Company reported a profit of Rs 302.46 crore in Q2 FY21 against Rs 301.84 crore YoY. Net premium income rose to Rs 8,572.2 crore from Rs 8,064.7 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	15.0	136.9	92.0
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)	62,300	55,282	55,781
F&O(INR cr)	2,154,121	2,537,983	1,809,289

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.4	28.0	29.9
NSE VIX	22.2	21.2	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	24,770	2.9 %	36.0 %	Energy	14,752	0.9 %	37.0 %
IT	21,023	(1.1) %	74.5 %	Pharma	11,512	1.6 %	63.8 %
Metals	2,360	0.1 %	51.9 %	Finance	12,082	2.1 %	35.1 %
Auto	7,931	1.2 %	70.3 %	PSU	1,292	(0.9) %	0.7 %
FMCG	30,164	1.3 %	14.4 %	Real Estate	229	(0.7) %	33.1 %

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>
Kotak Mah.	1,588	12.1 %	34.4 %	Hindustan	215	(9.3) %	33.8 %
ACC	1,684	6.7 %	74.8 %	L & T Info	2,899	(3.3) %	108.2 %
Shree Ceme	21,734	6.4 %	31.3 %	United Bre	919	(2.6) %	3.3 %
Nestle Ind	17,230	6.0 %	10.1 %	Punjab Nat	27	(2.3) %	(10.2) %
Colgate-Pa	1,543	5.8 %	24.1 %	TCS	2,630	(2.2) %	53.9 %

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