



29 Oct.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,730	(1.3) %	42.1 %
BSE SENSEX	39,922	(1.5) %	41.2 %
CNX BANK	24,233	(2.2) %	33.1 %
CNX MIDCAP	17,048	(1.0) %	48.6 %
CNX SMALLCAP	5,893	(1.0) %	66.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,520	(3.4) %	(7.1) %
S&P 500	3,271	(3.5) %	1.2 %
FTSE 100	5,583	(2.6) %	(26.6) %
HANG SENG	24,709	(0.3) %	(13.4) %
NIKKEI	23,419	(0.3) %	0.9 %
SHANGHAI COMPOSITE	3,269	0.5 %	6.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.67	0.0 %	3.5 %
EUR/USD	1.18	(0.3) %	5.4 %
GBP/USD	1.30	0.0 %	(1.1) %
USD/JPY	104.62	(0.1) %	(3.7) %
USD/AUD	1.40	0.0 %	(1.7) %
USD/SGD	1.36	0.0 %	1.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	0.0 %	(35.3) %
Gold(INR/10g)	50,656	(0.4) %	29.9 %
Gold Comex(USD/oz)	1,871	(2.0) %	21.3 %
SILVER(INR/1Kg)	60,732	(1.6) %	31.9 %
Aluminium(USD/MT)	1,801	(0.4) %	1.6 %
Copper(USD/MT)	6,695	(1.4) %	8.6 %

**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:** According to the newest UNWTO World Tourism Barometer, international arrivals plunged 81% in July and 79% in August, traditionally the two busiest months of the year and the peak of the Northern Hemisphere summer season. The drop until August represents 700 million fewer arrivals compared to the same period in 2019 and translates into a loss of US\$ 730 billion in export revenues from international tourism. This is more than eight times the loss experienced on the back of the 2009 global economic and financial crisis. Germany's import prices declined 4.3% year-on-year in September, faster than the 4% decrease seen in August, data released by Destatis revealed Wednesday. Data showed that energy import prices were 29.7% cheaper in September than in the same period last year. Prices for imported intermediate goods slid 2.5% and that of capital goods dropped 1%. Australia consumer prices were up 0.7% on year in the third quarter of 2020, the Australian Bureau of Statistics said on Wednesday following the 0.3% decline in the previous three months. On a quarterly basis, inflation climbed 1.6% following the 1.9% contraction in the three months prior.

**Global Equities:** The S&P 500 and the Dow tested their lowest levels since late-September on Wednesday as coronavirus cases surged globally and fears of a closely contested US presidential election next week added to worries.

**Indian Economy:** RBI stated that states' consolidated gross fiscal deficit (GFD) is placed at 2.8% of GDP for 2020-21; however, the COVID-19 pandemic may alter budget estimates substantially. The consequent rising levels of debt and guarantees pose risks to state finances, going forward. Sustaining the recovery from the pandemic will entail boosting investment in health care systems consistent with demographic and co-morbidity profiles; building digital infrastructure for more efficient provision of public services; upgrading the urban infrastructure; and increasing engagement of local governments.

**Equity Markets:** Domestic shares slumped on Wednesday on weak global cues as coronavirus infections grew at an alarming pace in the United States and Europe. Uncertainty over next week's US Presidential elections also worried investors. Banks and financial stocks witnessed major selling. The Nifty managed to close above the 11,700 mark after slipping below that level in intraday trade.

**Corporate News:** Larsen & Toubro, the engineering and infrastructure major, reported consolidated profit at Rs 5,520.3 crore in Q2FY21, a jump of 118% compared to the year-ago period due to the divestment of electrical and automation business to Schneider Electric, France. The company recorded consolidated gross revenues of Rs 31,035 crore for the quarter ended September 2020, declining 12% YoY due to the lingering impact of the pandemic during the quarter under review. Axis Bank reported a net profit of Rs 1,683 crore for Q2FY21 as against a net loss of Rs 112 crore in Q2FY20. The bank said its net interest income (NII) grew 20% YoY to Rs 7,326 crore in Q2FY21 from Rs 6,102 crore in Q2FY20. Tata Chemicals, TVS Motor Company, Aegis Logistics, Apollo Pipes, Arvind, Astec Lifesciences, Bajaj Healthcare, Blue Dart Express, Great Eastern Shipping, Himadri Speciality Chemical, JK Paper, Laurus Labs etc, will be in focus ahead of latest earnings today.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	486.7	156.4	94.8
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)	59,920	55,526	55,810
F&O(INR cr)	2,901,390	2,557,110	1,816,873

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	40.3	28.7	30.0
NSE VIX	23.3	21.3	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	24,233	(2.2) %	33.1 %	Energy	14,688	(0.4) %	36.4 %
IT	20,810	(1.0) %	72.8 %	Pharma	11,325	(1.6) %	61.2 %
Metals	2,325	(1.4) %	49.7 %	Finance	11,802	(2.3) %	32.0 %
Auto	7,923	(0.1) %	70.1 %	PSU	1,272	(1.6) %	(0.9) %
FMCG	29,948	(0.7) %	13.6 %	Real Estate	224	(2.0) %	30.4 %

### 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>
Adani Gree	777	5.0 %	408.1 %	DLF	156	(5.5) %	17.7 %
Bharti Air	452	4.3 %	7.2 %	Muthoot Fi	1,201	(3.9) %	98.6 %
Avenue Sup	2,240	2.9 %	7.6 %	H D F C	1,969	(3.5) %	24.3 %
UPL	451	2.8 %	47.4 %	IndusInd B	593	(3.4) %	73.2 %
Marico	363	1.8 %	36.7 %	Motherson	106	(3.4) %	83.4 %

### 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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