



30 Oct.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,671	0.0 %	41.4 %
BSE SENSEX	39,750	(0.4) %	40.6 %
CNX BANK	24,092	0.0 %	32.3 %
CNX MIDCAP	16,974	0.0 %	48.0 %
CNX SMALLCAP	5,839	0.0 %	64.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,659	0.5 %	(6.6) %
S&P 500	3,310	1.2 %	2.5 %
FTSE 100	5,582	(0.0) %	(26.6) %
HANG SENG	24,587	(0.5) %	(13.9) %
NIKKEI	23,332	(0.4) %	0.5 %
SHANGHAI COMPOSITE	3,273	0.1 %	6.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.86	0.1 %	3.7 %
EUR/USD	1.18	(0.6) %	4.8 %
GBP/USD	1.30	(0.2) %	(1.4) %
USD/JPY	104.31	(0.5) %	(4.0) %
USD/AUD	1.41	0.5 %	(1.1) %
USD/SGD	1.36	0.2 %	1.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	36	(3.3) %	(40.9) %
Gold(INR/10g)	50,699	0.1 %	30.0 %
Gold Comex(USD/oz)	1,871	0.0 %	21.3 %
SILVER(INR/1Kg)	59,836	(1.5) %	29.9 %
Aluminium(USD/MT)	1,786	(0.8) %	0.8 %
Copper(USD/MT)	6,692	(0.0) %	8.5 %

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	0.1 %	(1.1) %

Global Economy: The US Commerce Department said real gross domestic product spiked by 33.1% in the third quarter after plunging by 31.4% in the second quarter. US pending home sales index slumped by 2.2% to 130.0 in September after spiking by 8.8% to 132.9 in August. First-time claims for U.S. unemployment benefits fell to their lowest level since before the coronavirus-induced lockdowns in the week ended October 24th, according to a report released by the Labor Department on Thursday. The report said initial jobless claims dropped to 751,000, a decrease of 40,000 from the previous week's revised level of 791,000. Eurozone economic confidence stagnated in October. The economic confidence index held steady at 90.9 in October, survey results from European Commission showed on Thursday. The industrial confidence index advanced to -9.6 from -11.4 a month ago. This was the sixth consecutive rise. However, the services sentiment index fell to -11.8 from -11.2. Germany's jobless rate held steady at seasonally adjusted 4.5% in September, labor force survey results from Destatis showed on Thursday. On an unadjusted basis, the unemployment rate fell to 4.4% from 4.6% in the previous month. UK car production for the month of September reached its lowest for 25 years as demand from foreign markets remained negative, data from the Society of Motor Manufacturers and Traders showed Thursday. Car manufacturing output slid 5% on a yearly basis to 114,732 units in September, the weakest level since 1995. Japan's consumer confidence index rose the highest level in eight months in October, data from the Cabinet Office showed on Thursday. On a seasonally adjusted basis, the consumer confidence index increased to 33.6 in October from 32.7 in September.

Global Equities: US markets recovered on supportive economic cues and bargain hunting after recent losses.

Indian Economy: Indian Gold jewellery demand staged a modest recovery from its Q2 record low but remained well below 2019 levels, according to World Gold Council (WGC). Demand was 48% lower y-o-y at just 52.8t – the third lowest quarter for Indian jewellery demand in WGC data series. Not only did Indian consumers have to cope with recurring lockdowns and unprecedented gold prices, but also the inauspicious periods of Pitru-Paksha and Adhik Maas discouraged buying during September. India Meteorological Department (IMD) stated in a latest update that in view of significant reduction in rainfall activity over most parts of the country, the Southwest Monsoon has withdrawn from the entire country as on 28th October 2020. Simultaneously with the setting in of northeasterly winds in the lower tropospheric levels, the Northeast Monsoon rains have commenced over extreme south peninsular India, stated the IMD.

Equity Markets: Equity indices witnessed volatile trading and ended with modest losses on Thursday. Sentiment was weak as surging Covid-19 infections in US and Europe clouded the global economic outlook. Barring the Nifty IT index, all other sectoral indices on the NSE ended in the red. The Nifty closed below 11,700 mark.

Corporate News: Banking stocks will be in focus. Non-food bank credit growth decelerated to 5.8% in September 2020 from 8.1% in the same month of the previous year, according to the RBI data. Credit to industry recorded 'nil' growth in September 2020 as compared with 2.7% growth in September 2019, the data on Sectoral Deployment of Bank Credit - September 2020. Vodafone Idea reported a consolidated loss of Rs 7,218.2 crore in Q2 FY21 against a loss of Rs 25,460 crore. Revenue rose to Rs 10,791.2 crore from Rs 10,659.3 crore QoQ. HPCL will consider a share buyback on November 4.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(118.2)	141.9	93.3
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)	51,802	55,340	55,782
F&O(INR cr)	5,428,673	2,700,688	1,841,782

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	37.6	29.1	30.0
NSE VIX	24.0	21.4	28.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,092	(0.6) %	32.3 %	Energy	14,722	0.2 %	36.7 %
IT	20,877	0.3 %	73.3 %	Pharma	11,226	(0.9) %	59.8 %
Metals	2,308	(0.8) %	48.5 %	Finance	11,711	(0.8) %	31.0 %
Auto	7,847	(1.0) %	68.5 %	PSU	1,264	(0.6) %	(1.5) %
FMCG	29,663	(1.0) %	12.5 %	Real Estate	223	(0.4) %	29.8 %

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	816	5.0 %	433.5 %	Piramal En	1,215	(5.3) %	29.8 %
Pidilite I	1,591	4.8 %	22.6 %	Larsen & T	935	(4.9) %	20.7 %
H P C L	180	4.5 %	(2.4) %	Titan Comp	1,178	(3.2) %	25.9 %
Berger Pai	630	3.9 %	30.3 %	Adani Port	343	(3.1) %	40.0 %
Muthoot Fi	1,238	3.1 %	104.8 %	O N G C	64	(2.9) %	(2.1) %

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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