



### Indices Performance

Global Indices	30-Oct	Prev_Day	Abs. Change	% Change
Russell 3000	1,685	1,726	-41	-2.40
Nasdaq	10,912	11,186	-274	-2.45
FTSE	5,577	5,582	-4	-0.08
Nikkei	22,977	23,332	-355	-1.52
Hang Seng	24,107	24,587	-479	-1.95
Indian Indices	30-Oct	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	39,614	39,750	-136	-0.34
Nifty 50	11,642	11,671	-28	-0.24
Nifty 100	11,749	11,774	-25	-0.22
Nifty 500	9,582	9,593	-12	-0.12
Nifty Bank	23,901	24,092	-191	-0.79
S&P BSE Power	1,729	1,713	16	0.96
S&P BSE Small Cap	14,888	14,893	-5	-0.03
S&P BSE HC	19,258	19,256	1	0.01

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
30-Oct	27.55	1.03	31.90	1.36
Month Ago	27.85	1.02	32.69	1.41
Year Ago	27.19	1.15	27.30	1.26

### Nifty 50 Top 3 Gainers

Company	30-Oct	Prev_Day	% Change
Adani Ports & SEZ	360	343	5.00
BPCL	354	342	3.70
Coal India	114	111	3.02

### Nifty 50 Top 3 Losers

Company	30-Oct	Prev_Day	% Change
Bharti Airtel	434	451	-3.78
Hero Moto	2800	2894	-3.26
NA	2086	2137	-2.40

### Advance Decline Ratio

	BSE	NSE
Advances	1319	938
Declines	1271	908
Unchanged	161	129

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	-872	47887
MF Flows**	-1350	5717

\*29<sup>th</sup> Oct 2020; \*\*22<sup>nd</sup> Oct 2020

### Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	7.34% (Sep-20)	6.23% (Jun-20)	3.99% (Sep-19)
IIP	-8.00% (Aug-20)	-33.40% (May-20)	-1.40% (Aug-19)
GDP	-23.90% (Jun-20)	3.10% (Mar-20)	5.20% (Jun-19)

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

[1] Data as on 30 Oct, 2020

### Global Indices

- Asian markets closed in the red with the threat of rising coronavirus cases and jitters over the upcoming U.S. presidential election. Today (as on Nov 2), markets are trading higher with investors taking positive cues from official Chinese manufacturing PMI data released over the weekend. Both Nikkei and Hang Seng are up 1.20% and 0.69% (as at 8:00 AM IST), respectively.
- European markets largely closed lower as uncertainty about the outcome of U.S. Presidential election and worries about rising coronavirus cases overshadowed positive impact of better-than-expected Euro Zone GDP data.
- U.S. markets slipped with investors taking weak cues from a series of earnings news of a number of major tech companies. Lingering concerns about the recent spike in COVID-19 cases also weighed on Wall Street along with uncertainty about next week's Presidential election.

### Indian Equity Market

- Indian equity markets ended the last trading session of the week in the red with investors reacting to data showing India's infrastructure output remained in contraction, albeit at a slower rate in Sep 2020. Additionally, India's fiscal deficit during the period from Apr to Sep of 2020 exceeded the full year target of Rs. 7.96 lakh crore by almost 15%.
- Key benchmark indices S&P BSE Sensex and Nifty 50 lost 0.34% and 0.24% to close at 39,614.07 and 11,642.40 respectively.
- The overall market breadth on BSE was strong with 1,319 scrips advancing and 1,271 scrips declining. A total of 161 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Realty was the major gainer, up 2.19% followed by S&P BSE Metal, up 1.53% and S&P BSE Energy, up 1.51%. S&P BSE Telecom was the major loser, down 2.37% followed by S&P BSE Auto, down 1.17% and S&P BSE Bankex, down 0.92%.

### Domestic News

- According to World Bank, remittances to India may come down by 9% to \$76 billion which it attributed to the ongoing COVID-19 pandemic and global economic recession. World Bank further added that some of the factors which may lead to a decline in remittances are weak economic growth, increasing unemployment, lower global crude oil prices and weakening of the currencies of remittance-source countries against the greenback.
- The Union Cabinet approved nationwide project for rehabilitation and improvement of dams worth Rs. 10,211 crore. The objective of the move is to ensure safety of dams, enhance water security of the country and support sustainable development while creating employment opportunities.
- The government banned export of onion seeds with immediate effect. The move comes amid rising prices of onions in the market on account of damage done by heavy rainfall to standing Kharif crop across several parts of the country.
- The Cabinet Committee on Economic Affairs approved that 100% of the foodgrains and 20% of the sugar need to be mandatorily packed in diversified jute bags. The objective of the move is to give a push to the diversification of the jute industry and help in price discovery.
- Reliance Industries reported a 15% drop in net profit for the quarter ended Sep 2020 as compared to the same period of the previous year. The consolidated net profit fell to Rs. 9,567 crore as compared to a net profit of Rs. 11,262 crore in the same period of the previous year. However, the net profit of Reliance Jio jumped almost three fold to Rs. 2,844 crore in Q2FY21 as compared to Rs. 990 crore in the same period of the previous year.
- According to media reports, Lubrizol Advanced Materials and Grasim Industries have entered into a definitive agreement for setting up a plant to manufacture and supply CPVC resin in India. The objective of the move is to meet the increasing demand for chlorinated polyvinyl chloride pipe and fittings in India.

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FII Derivative Trade Statistics		30-Oct		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	7324.35	8983.53	8962.20	
Index Options	512602.86	506642.86	43498.15	
Stock Futures	22229.27	20761.02	75615.35	
Stock Options	3028.68	2748.16	1761.58	
Total	545185.16	539135.57	129837.28	

Derivative Statistics- Nifty Options			
	30-Oct	Prev_Day	Change
Put Call Ratio (OI)	1.46	1.24	0.22
Put Call Ratio(Vol)	1.04	0.98	0.07

Debt Watch				
	29-Oct	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.25%	3.22%	3.43%	5.10%
T-Repo	3.07%	3.08%	3.21%	4.82%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.19%	3.17%	3.33%	5.05%
364 Day T-Bill	3.42%	3.43%	3.65%	5.27%
10 Year Gilt	5.88%	5.84%	6.02%	6.49%
G-Sec Vol. (Rs.Cr)	40111	60480	29903	31786
FBIL MIBOR	3.48%	3.45%	3.79%	5.25%
3 Month CP Rate	3.35%	3.38%	3.55%	5.60%
5 Year Corp Bond <sup>[1]</sup>	6.47%	6.49%	6.71%	7.49%
1 Month CD Rate	3.19%	3.23%	3.19%	5.19%
3 Month CD Rate	3.20%	3.22%	3.39%	5.48%
1 Year CD Rate	3.72%	3.73%	3.94%	5.90%

Currency Market			
Currency	29-Oct	Prev_Day	Change
USD/INR	73.97	73.77	0.21
GBP/INR	96.33	96.30	0.03
EURO/INR	86.97	86.92	0.04
JPY/INR	0.71	0.71	0.00

Commodity Prices				
Commodity	30-Oct	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	35.62	39.63	40.00	54.80
Brent Crude(\$/bl)	35.76	40.85	40.18	59.98
Gold(\$/oz)	1878	1901	1885	1495
Gold(Rs./10 gm)	50645	51044	50325	38630

Source: Refinitiv

[1] Data as on 30 Oct, 2020

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#### Derivatives Market

- Nifty Nov 2020 Futures stood at 11,638.40, a discount of 4.00 points below the spot closing of 11,642.40. The turnover on NSE's Futures and Options segment fell to Rs. 12,67,868.59 crore on October 30, 2020, compared with Rs. 54,28,672.58 crore on October 29, 2020.
- The Put-Call ratio stood at 0.99 compared with the previous session's close of 0.88.
- The Nifty Put-Call ratio stood at 1.46 compared with the previous session's close of 1.24.
- Open interest on Nifty Futures stood at 11.58 million, compared with the previous session's close of 13.62 million.

#### Indian Debt Market

- The domestic debt market remained closed on account of Id-E-Milad.

#### Currency Market Update

- The domestic currency market remained closed on account of Id-E-Milad.
- The euro remained at touched four week low against the U.S. dollar after the European Central Bank president highlighted further monetary easing in Dec 2020.

#### Commodity Market Update

- Gold prices rose as the safe haven appeal of the yellow metal improved amid persisting concerns over the COVID-19 pandemic.
- Brent crude prices rose on bargain hunting. However, concerns over COVID-19 pandemic capped the gains.

#### International News

- U.S. real gross domestic product (GDP) surged 33.1% in the Sep quarter of 2020 after plummeting 31.4% in the Jun quarter of 2020. Rebound in GDP was due to consumer spending that rose sharply by 40.7% in Sep quarter after 33.2% plunge in the second quarter.
- Preliminary flash estimate from Eurostat showed, euro area gross domestic product (GDP) surged 12.7% QoQ in the Sep quarter of 2020, compared with a fall of 11.8% in the previous quarter. Rise in GDP was the sharpest seen since the series started in 1995.
- The Ministry of Economy, Trade and Industry said, Japan's industrial output rose 4.0% (seasonally adjusted) sequentially in Sep 2020, faster than 1.0% rise in Aug 2020. Annually, industrial output fell 9.0%, slower than 13.8% plunge in the prior month.

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