

### Indices Performance

Global Indices	16-Nov	Prev_Day	Abs. Change	% Change
Russell 3000	1,834	1,824	11	0.59
Nasdaq	11,924	11,829	95	0.80
FTSE	6,421	6,316	105	1.66
Nikkei	25,907	25,386	521	2.05
Hang Seng	26,382	26,157	225	0.86
Indian Indices	13-Nov	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	43,443	43,357	86	0.20
Nifty 50	12,720	12,691	29	0.23
Nifty 100	12,804	12,764	40	0.31
Nifty 500	10,387	10,343	45	0.43
Nifty Bank	28,466	28,279	187	0.66
S&P BSE Power	1,870	1,856	14	0.74
S&P BSE Small Cap	15,639	15,466	173	1.12
S&P BSE HC	19,827	19,572	255	1.30

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
13-Nov	30.51	0.93	34.57	1.25
Month Ago	29.17	1.01	34.13	1.35
Year Ago	26.77	1.14	27.32	1.26

### Nifty 50 Top 3 Gainers

Company	13-Nov	Prev_Day	% Change
Eicher Motors	2515	2351	6.97
Bajaj Finserv Limited	7261	7026	3.34
Coal India	126	122	3.11

### Nifty 50 Top 3 Losers

Company	13-Nov	Prev_Day	% Change
Tata Motors	146	151	-3.21
L&T Ltd.	1052	1073	-2.02
HDFC Ltd.	2307	2332	-1.09

### Advance Decline Ratio

	BSE <sup>[1]</sup>	NSE <sup>[1]</sup>
Advances	1596	1134
Declines	1076	730
Unchanged	184	127

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	3559	77323
MF Flows**	-1024	-8658

\*13<sup>th</sup> Nov 2020; \*\*12<sup>th</sup> Nov 2020

### Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	7.61% (Oct-20)	6.73% (Jul-20)	4.62% (Oct-19)
IIP	0.20% (Sep-20)	-16.60% (Jun-20)	-4.60% (Sep-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 13 Nov, 2020

### Global Indices

- Asian markets closed in the green as worries over rising COVID-19 cases took a backseat with investors taking positive cues from upbeat GDP data for Sep quarter from Japan and industrial output figures from China for Oct. Today (as on Nov 17), markets are trading higher, tracking positive developments on the coronavirus vaccine front. Both Nikkei and Hang Seng are up 0.27% and 0.51%, respectively.
- European markets witnessed strong gains buoyed up rising optimism over effective coronavirus vaccine. Signs of progress in Brexit negotiations, and strong economic data from China and Japan also contributed to the upside.
- U.S. markets went up with investors taking positive cues after another major pharma company said that the trial of its potential coronavirus vaccine has met the statistical criteria pre-specified in the study protocol for efficacy, with a vaccine efficacy of 94.5%.

### Indian Equity Market

- Indian equity markets ended the last trading session of the week in the green. Investors continued to take positive cues from reports on the coronavirus vaccine and hopes of improving economic indicators in the near future. Nonetheless, resurgence of the COVID-19 cases worldwide restricted the gains.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.2% and 0.23% to close at 43,443.00 and 12,719.95 respectively.
- The overall market breadth on BSE was strong with 1,596 scrips advancing and 1,076 scrips declining. A total of 185 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Metal was the major gainer, up 1.94% followed by S&P BSE Realty, up 1.37% and S&P BSE Healthcare, up 1.3%. S&P BSE Capital Goods was the major loser, down 0.33% followed by S&P BSE Telecom, down 0.28% and S&P BSE FMCG, down 0.22%.

### Domestic News

- By announcing steps that could infuse liquidity in companies as well as lenders, the central government has given another boost to the infrastructure market. On government and public sector tenders, the government has relaxed earnest cash deposit and performance protection. It will also put in Rs. 6,000 crore as equity in the National Investment and Infrastructure Fund, which will be used to create a debt platform for infrastructure financing.
- According to the RBI's data released in the weekly statistical supplement, India's foreign exchange reserves surged \$7.779 billion to reach lifetime high of \$568.49 billion in the week ended Nov 6, 2020 from \$560.72 billion in the previous week.
- Government has approved to release nearly Rs. 4,381.88 crore to six states as central assistance for the natural calamities (cyclone, floods and landslides) they have seen this year. West Bengal, Odisha, Karnataka, Madhya Pradesh, Maharashtra and Sikkim are the states to whom Funds will be released.
- The government announced a new version of its Rs 3-lakh-crore guaranteed loan programme, originally meant for MSMEs, to benefit even larger firms in 27 stressed sectors affected by Covid-19 pandemic.
- Future Retail Ltd reported consolidated net loss of Rs. 692.36 crore for quarter ended Sep 2020 due to disruptions caused by COVID-19 pandemic as against net profit of Rs. 165.08 crore in the quarter ended Sep 2019.
- Natco Pharma said its marketing partner, Breckenridge Pharmaceutical, has obtained final approval for the treatment of patients with multiple myeloma cancer from the U.S. health regulator for Pomalidomide Capsules.

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FII Derivative Trade Statistics		13-Nov		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	3421.48	5073.72	13905.60	
Index Options	574257.31	570572.46	74023.65	
Stock Futures	15867.24	16022.30	93552.08	
Stock Options	6809.52	6845.19	6862.97	
Total	600355.55	598513.67	188344.30	

Derivative Statistics- Nifty Options			
	13-Nov	Prev_Day	Change
Put Call Ratio (OI)	1.53	1.40	0.13
Put Call Ratio(Vol)	0.93	0.89	0.04

Debt Watch				
	13-Nov	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.21%	3.20%	3.36%	5.09%
T-Repo	2.62%	2.98%	3.05%	4.92%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.05%	3.18%	3.25%	5.04%
364 Day T-Bill	3.44%	3.43%	3.47%	5.21%
10 Year Gilt	5.90%	5.88%	5.93%	6.52%
G-Sec Vol. (Rs.Cr)	32529	21089	47665	35660
FBIL MIBOR	3.41%	3.44%	3.66%	5.25%
3 Month CP Rate	3.28%	3.34%	3.40%	5.50%
5 Year Corp Bond	6.46%	6.51%	6.62%	7.50%
1 Month CD Rate	3.09%	3.13%	3.17%	5.03%
3 Month CD Rate	3.07%	3.18%	3.25%	5.15%
1 Year CD Rate	3.74%	3.74%	3.77%	5.92%

Currency Market			
Currency	13-Nov	Prev_Day	Change
USD/INR	74.67	74.45	0.22
GBP/INR	98.00	98.28	-0.28
EURO/INR	88.15	87.62	0.53
JPY/INR	0.71	0.71	0.00

Commodity Prices				
Commodity	16-Nov	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	41.12	40.03	40.65	57.49
Brent Crude(\$/bl)	42.79	40.68	40.84	63.46
Gold( \$/oz)	1889	1862	1899	1467
Gold(Rs./10 gm)	50738	52280	50796	38096

Source: Refinitiv

[1] Data as on 13 Nov, 2020

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### Derivatives Market

- Nifty Nov 2020 Futures stood at 12,753.40, a premium of 33.45 points above the spot closing of 12,719.95. The turnover on NSE's Futures and Options segment fell to Rs. 14,57,284.09 crore on November 13, 2020, compared with Rs. 55,31,324.77 crore on November 12, 2020.
- The Put-Call ratio stood at 0.86 compared with the previous session's close of 0.79.
- The Nifty Put-Call ratio stood at 1.53 compared with the previous session's close of 1.4.
- Open interest on Nifty Futures stood at 13.42 million, compared with the previous session's close of 13.26 million.

### Indian Debt Market

- Bond yields eased after the Reserve Bank of India (RBI) announced more open market operations (OMO) to help clear out a record borrowing schedule.
- Yield on the 10-year benchmark paper (5.77% GS 2030) fell 2 bps to close at 5.88% from the previous close of 5.90% after trading in a range of 5.88% to 5.92%.
- RBI announced to conduct the auction of four government securities- 4.48% GS 2023, 6.22% GS 2035 and 6.67% GS 2050 for a notified amount of Rs. 22,000 crore on Nov 20, 2020.
- RBI announced to conduct the auction of 91 days, 182 days and 364 days Treasury Bills for a notified amount of Rs. 9,000 crore, Rs. 3,000 crore and Rs. 4,000 crore on Nov 18, 2020.

### Currency Market Update

- The Indian rupee inched up against the greenback following gains in the domestic equity market. However, most of the gains were capped due to persistent dollar purchases from state-run banks, likely on behalf of the Reserve Bank of India.
- The euro rose against the greenback on hopes that Britain and the European Union could make progress negotiating a post-Brexit trade deal.

### Commodity Market Update

- Gold prices rose on worries over rise in coronavirus infection cases across the globe. However, optimism over a COVID-19 vaccine capped the gains.
- Brent crude prices rose on hopes that OPEC+ will hold current output restrictions.

### International News

- According to flash estimate from Eurostat, Eurozone gross domestic product (GDP) rose 12.6% QoQ in the third quarter of 2020 as against 11.8% decline in the second quarter of 2020. On a yearly basis, GDP fell 4.4% in the third quarter as against 14.8% decrease seen in the second quarter. Euro area grew at the fastest pace on record in the third quarter after shrinking for two straight quarters following ease in Covid-19 control measures.
- According to data from Destatis, Germany's wholesale price index fell 1.9% YoY in Oct 2020 as against 1.8% fall in Sep 2020. On a monthly basis, wholesale prices fell 0.2% in Oct after remaining unchanged in Sep.

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