

### Indices Performance

| Global Indices    | 17-Nov | Prev_Day | Abs. Change | % Change |
|-------------------|--------|----------|-------------|----------|
| Russell 3000      | 1,832  | 1,834    | -2          | -0.10    |
| Nasdaq            | 11,899 | 11,924   | -25         | -0.21    |
| FTSE              | 6,365  | 6,421    | -56         | -0.87    |
| Nikkei            | 26,015 | 25,907   | 108         | 0.42     |
| Hang Seng         | 26,415 | 26,382   | 33          | 0.13     |
| Indian Indices    | 17-Nov | Prev_Day | Abs. Change | % Change |
| S&P BSE Sensex    | 43,953 | 43,443   | 510         | 1.17     |
| Nifty 50          | 12,874 | 12,720   | 154         | 1.21     |
| Nifty 100         | 12,961 | 12,804   | 157         | 1.22     |
| Nifty 500         | 10,524 | 10,387   | 137         | 1.32     |
| Nifty Bank        | 29,181 | 28,466   | 716         | 2.51     |
| S&P BSE Power     | 1,893  | 1,870    | 23          | 1.21     |
| S&P BSE Small Cap | 15,910 | 15,639   | 270         | 1.73     |
| S&P BSE HC        | 19,792 | 19,827   | -35         | -0.18    |

### P/E Dividend Yield

| Date      | Sensex |            | Nifty |            |
|-----------|--------|------------|-------|------------|
|           | P/E    | Div. Yield | P/E   | Div. Yield |
| 17-Nov    | 31.35  | 0.92       | 34.93 | 1.23       |
| 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                          | 17-Nov | Prev_Day | % Change |
|----------------------------------|--------|----------|----------|
| Tata Motors                      | 158    | 146      | 7.96     |
| Tata Steel                       | 523    | 487      | 7.43     |
| HDFC Standard Life Insurance Con | 670    | 628      | 6.78     |

### Nifty 50 Top 3 Losers

| Company   | 17-Nov | Prev_Day | % Change |
|-----------|--------|----------|----------|
| Hero Moto | 3031   | 3129     | -3.12    |
| NTPC      | 89     | 91       | -3.01    |
| HCL Tech  | 815    | 828      | -1.58    |

### Advance Decline Ratio

|           | BSE  | NSE  |
|-----------|------|------|
| Advances  | 1549 | 1058 |
| Declines  | 1271 | 853  |
| Unchanged | 182  | 113  |

### Institutional Flows (Equity)

| Description (Cr) | Inflow/Outflow | YTD   |
|------------------|----------------|-------|
| FII Flows*       | 1731           | 79054 |
| MF Flows**       | -1024          | -8658 |

\*17<sup>th</sup> Nov 2020; \*\*12<sup>th</sup> Nov 2020

### Economic Indicator

| YoY(%) | Current             | Quarter Ago         | Year Ago           |
|--------|---------------------|---------------------|--------------------|
| CPI    | 7.61%<br>(Oct-20)   | 6.73%<br>(Jul-20)   | 4.62%<br>(Oct-19)  |
| IIP    | 0.20%<br>(Sep-20)   | -16.60%<br>(Jun-20) | -4.60%<br>(Sep-19) |
| GDP    | -23.90%<br>(Jun-20) | 3.10%<br>(Mar-20)   | 5.20%<br>(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 largely closed in the green as optimism over experimental COVID-19 vaccine outweighed worries about the continued surge in coronavirus cases worldwide. Today (as on Nov 18), markets are witnessing mixed trend as investors remained cautious over surge in coronavirus cases despite vaccine hopes. Both Nikkei and Hang Seng are down 0.97% and 0.13% (as at 8:00 AM IST), respectively.
- European markets largely closed in the red amid worries about tighter coronavirus restrictions across the continent. Conflicting reports about the progress in Brexit negotiations, reports about Hungary and Poland blocking the EU's 750-billion-euro coronavirus stimulus package hurt market sentiments.
- U.S. markets closed lower amid profit booking and after report from the Commerce Department showed retail sales rose lower than expected in Oct.

### Indian Equity Market

- Indian equity markets extended the rally, tracking positive global cues, amid reports that another major global pharma company, in its trial of potential coronavirus vaccine, met the statistical criteria pre-specified in the study protocol for efficacy, with a vaccine efficacy of 94.5%.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 1.17% and 1.21% to close at 43,952.71 and 12,874.20 respectively.
- The overall market breadth on BSE was strong with 1,549 scrips advancing and 1,271 scrips declining. A total of 182 scrips remained unchanged.

### Domestic News

- The Department of Investment and Public Asset Management (DIPAM) has signed an agreement with World Bank for receiving advisory services on asset monetization. The objective of the move is to provide support to DIPAM in detailing & globally benchmarking the policies & processes for asset monetization to help unlock their value & channelize investments & growth.
- The Central Government has approved an additional outlay of Rs.10,000 Crores for PM Garib Kalyan Rozgar Yojana. The objective of the move is to give a boost to rural employment. The PM Garib Kalyan Rozgar Yojana is already in progress in 116 districts and Rs. 37,543 crore has been spent till date.
- The Central Government has decided to provide Rs. 65,000 crore for ensuring adequate availability of fertilizers for farmers in the upcoming crop season. The increased supply of fertilizers at subsidized rate is expected to help 140 million farmers.
- The Central Government has decided to set up a fund worth Rs. 3,000 crore to promote Indian exports.
- Tata Consultancy Services (TCS) has announced that it is creating an investment insight solution for the capital markets industry, leveraging the SAP Business Technology Platform.
- Flipkart Group has acquired Scapic, an Augmented Reality company (AR), to boost its e-commerce shopping experience capabilities. Scapic is a cloud-based platform that allows Augmented Reality (AR) and 3D content to be produced and published and currently serves consumers through e-commerce and marketing.

Good gets better



| FII Derivative Trade Statistics |          | 17-Nov   |           |
|---------------------------------|----------|----------|-----------|
| (Rs Cr)                         | Buy      | Sell     | Open Int. |
| Index Futures                   | 233.09   | 81.56    | 14454.76  |
| Index Options                   | 15837.13 | 17005.55 | 78353.27  |
| Stock Futures                   | 274.62   | 93.51    | 94645.18  |
| Stock Options                   | 352.30   | 354.12   | 7150.46   |
| Total                           | 16697.14 | 17534.74 | 194603.67 |

| Derivative Statistics- Nifty Options |        |          |        |
|--------------------------------------|--------|----------|--------|
|                                      | 17-Nov | Prev_Day | Change |
| Put Call Ratio (OI)                  | 1.59   | 1.53     | 0.06   |
| Put Call Ratio(Vol)                  | 1.06   | 0.93     | 0.13   |

| Debt Watch                |        |         |          |          |
|---------------------------|--------|---------|----------|----------|
|                           | 17-Nov | Wk. Ago | Mth. Ago | Year Ago |
| Call Rate                 | 3.12%  | 3.13%   | 3.36%    | 5.09%    |
| T-Repo                    | 2.78%  | 3.00%   | 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             | 2.95%  | 3.08%   | 3.20%    | 5.04%    |
| 364 Day T-Bill            | 3.40%  | 3.46%   | 3.50%    | 5.20%    |
| 10 Year Gilt              | 5.88%  | 5.92%   | 5.93%    | 6.52%    |
| G-Sec Vol. (Rs.Cr)        | 23164  | 30043   | 47665    | 35660    |
| FBIL MIBOR <sup>[1]</sup> | 3.41%  | 3.43%   | 3.66%    | 5.25%    |
| 3 Month CP Rate           | 3.28%  | 3.34%   | 3.40%    | 5.50%    |
| 5 Year Corp Bond          | 6.44%  | 6.54%   | 6.62%    | 7.50%    |
| 1 Month CD Rate           | 2.99%  | 3.18%   | 3.17%    | 5.03%    |
| 3 Month CD Rate           | 3.10%  | 3.16%   | 3.25%    | 5.15%    |
| 1 Year CD Rate            | 3.71%  | 3.75%   | 3.77%    | 5.92%    |

| Currency Market |        |          |        |
|-----------------|--------|----------|--------|
| Currency        | 17-Nov | Prev_Day | Change |
| USD/INR         | 74.51  | 74.67    | -0.16  |
| GBP/INR         | 98.46  | 98.00    | 0.46   |
| EURO/INR        | 88.33  | 88.15    | 0.17   |
| JPY/INR         | 0.71   | 0.71     | 0.00   |

| Commodity Prices   |        |        |          |          |
|--------------------|--------|--------|----------|----------|
| Commodity          | 17-Nov | Wk Ago | Mth. Ago | Year Ago |
| NYMEX Crude(\$/bl) | 41.22  | 41.16  | 40.65    | 57.49    |
| Brent Crude(\$/bl) | 41.65  | 41.18  | 40.84    | 63.46    |
| Gold( \$/oz)       | 1879   | 1877   | 1899     | 1467     |
| Gold(Rs./10 gm)    | 50738  | 50446  | 50796    | 38096    |

Source: Refinitiv

[1] Data as on 13 Nov, 2020

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### Derivatives Market

- Nifty Nov 2020 Futures stood at 12,881.85, a premium of 7.65 points above the spot closing of 12,874.20. The turnover on NSE's Futures and Options segment rose to Rs. 19,18,919.64 crore on November 17, 2020, compared with Rs. 14,57,284.09 crore on November 13, 2020.
- The Put-Call ratio stood at 0.93 compared with the previous session's close of 0.86.
- The Nifty Put-Call ratio stood at 1.59 compared with the previous session's close of 1.53.
- Open interest on Nifty Futures stood at 13.63 million, compared with the previous session's close of 13.42 million.

### Indian Debt Market

- Bond yields remained almost steady on absence of fresh triggers.
- Yield on the 10-year benchmark paper (5.77% GS 2030) remained unchanged at 5.88% from the previous close after trading in a range of 5.87% to 5.88%.
- According to RBI data, Indian companies overseas direct investment stood at \$3,252.60 million in Oct 2020 compared with \$1,548.11 million in the previous month and \$3,571.28 million a year ago period.
- Banks borrowed Rs. 143 crore on Nov 13, 2020 under the central bank's marginal standing facility compared with the borrowing of Rs. 12 crore on Nov 12, 2020.

### Currency Market Update

- The Indian rupee gained for the second straight session against the U.S. dollar as news of another potentially effective coronavirus vaccine led to anticipation of a quicker economic recovery, which supported appetite for risk assets.
- Euro rose against the U.S. dollar supported by optimism over another coronavirus vaccine.

### Commodity Market Update

- Gold prices fell as optimism over a COVID-19 vaccine dampened the safe haven appeal of the bullion.
- Brent crude prices fell on persisting concerns over COVID-19 pandemic.

### International News

- According to a report released by the Federal Reserve Bank of New York, the New York manufacturing activity index (general business conditions index) surprisingly dropped to 6.3 in Nov 2020 from 10.5 in Oct 2020.
- Property website Rightmove report showed UK house prices fell 0.5% MoM, compared with 1.1% increase in Oct 2020. Fall was despite continuing strong buyer demand as new sellers joined the rush to sell and beat the Mar 2020 stamp duty deadline. Annually, house prices surged 6.3%, better than 5.5% rise in Oct 2020.
- Data from the Census and Statistics Department showed, Hong Kong's jobless rate remained steady at 6.4% in Aug 2020 to Oct 2020 compared with Jul to Sep 2020. The underemployment rate also remained steady at 3.8% during Aug to Oct 2020.

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