



### Indices Performance

Global Indices	20-Nov	Prev_Day	Abs. Change	% Change
Russell 3000	1,817	1,828	-11	-0.59
Nasdaq	11,855	11,905	-50	-0.42
FTSE	6,351	6,334	17	0.27
Nikkei	25,527	25,634	-107	-0.42
Hang Seng	26,452	26,357	95	0.36
Indian Indices	20-Nov	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	43,882	43,600	282	0.65
Nifty 50	12,859	12,772	87	0.68
Nifty 100	12,962	12,865	98	0.76
Nifty 500	10,561	10,478	83	0.79
Nifty Bank	29,236	28,903	333	1.15
S&P BSE Power	1,963	1,927	35	1.84
S&P BSE Small Cap	16,183	16,059	123	0.77
S&P BSE HC	19,723	19,629	94	0.48

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
20-Nov	31.28	0.92	35.36	1.23
Month Ago	29.42	0.99	34.28	1.33
Year Ago	28.38	1.14	27.23	1.24

### Nifty 50 Top 3 Gainers

Company	20-Nov	Prev_Day	% Change
Bajaj Finserv Limited	8543	7823	9.19
Titan Industries Limited	1365	1292	5.63
GAIL	97	94	4.06

### Nifty 50 Top 3 Losers

Company	20-Nov	Prev_Day	% Change
RIL	1900	1973	-3.73
Adani Ports & SEZ	376	382	-1.58
IndusInd Bank	811	818	-0.86

### Advance Decline Ratio

	BSE	NSE
Advances	1532	1099
Declines	1269	770
Unchanged	177	129

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	2188	92265
MF Flows**	-88	-12770

\*20<sup>th</sup> Nov 2020; \*\*18<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 19 Nov, 2020

### Global Indices

- Asian markets witnessed a mixed trend, amid surging COVID-19 cases. Investors focused on the latest developments concerning a public tiff between the U.S. Treasury and Federal Reserve over emergency lending facilities and the resumption of U.S. fiscal aid talks. Today (as on Nov 23), Asian markets rose as investors continue to watch for coronavirus developments. While Nikkei index was closed, Hang Seng was trading higher 0.79% (as at 8 a.m. IST).
- European markets rose as rising hopes around vaccines neutralised worries over increasing Covid-19 cases and ambiguity about a fiscal stimulus in the U.S.
- U.S. markets fell on worries about the near-term economic outlook amid a continued surge in new coronavirus cases in the U.S.

### Indian Equity Market

- Indian equity markets recovered from previous session's losses to end the last trading session of the week in the green. Bourses came under intra-day selling pressure soon after commencing the session today. However, hopes of COVID-19 vaccine and better economic outlook supported buying interest later, thereby helping the domestic markets to recoup its losses and close with gains.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.65% and 0.68% to close at 43,882.25 and 12,859.05 respectively.
- The overall market breadth on BSE was strong with 1,532 scrips advancing and 1,269 scrips declining. A total of 177 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Telecom was the major gainer, up 4.73% followed by S&P BSE Consumer Durables, up 2.77% and S&P BSE Power, up 1.83%. S&P BSE Energy was the only loser, down 2.84%.

### Domestic News

- A memorandum of understanding was signed between the Ministry of Petroleum and Natural gas and leading oil & gas marketing companies & technology providers for setting up Compressed Bio-Gas CBG plants across India under the Sustainable Alternative Towards Affordable Transportation (SATAT) initiative. The objective of the move is to give a boost to the availability of affordable and clean transport fuels. The Petroleum Minister in this regard said that Rs. 2 lakh crore will be invested for setting up a total of 5000 CBG plants.
- An internal working group constituted by the Reserve Bank of India (RBI) recommended that large industrial houses be allowed as promoters of banks. The internal working group also recommended that large non banking financial companies with asset size of more than Rs. 50,000 crore can be considered for conversion into banks subject to the completion of 10 years of operation.
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- According to reports, the government is planning to link e-courts with land records and registration databases of the department of land resources. The objective of the move is to bring about easier and earlier disposal of land disputes.
- In the midst of a recovery in demand for residential properties, Prestige Estates Projects Ltd will build four new housing projects in Bengaluru, Goa and Hyderabad with an investment of nearly Rs. 2,000 crore.
- Punjab & Sind Bank said a plan to raise up to Rs. 5,500 crore by issuing shares on a preferential basis was approved by its board.

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FII Derivative Trade Statistics		20-Nov		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	4059.83	4797.48	15195.28	
Index Options	599909.93	597684.24	76611.42	
Stock Futures	12931.01	14457.02	96687.45	
Stock Options	10121.21	10073.83	7661.15	
Total	627021.98	627012.57	196155.30	

Derivative Statistics- Nifty Options			
	20-Nov	Prev_Day	Change
Put Call Ratio (OI)	1.57	1.29	0.28
Put Call Ratio(Vol)	1.01	1.12	-0.11

Debt Watch				
	20-Nov	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.16%	3.21%	3.36%	5.07%
T-Repo	2.73%	2.62%	3.06%	4.97%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	2.86%	3.05%	3.15%	5.02%
364 Day T-Bill	3.40%	3.44%	3.40%	5.14%
10 Year Gilt	5.88%	5.90%	5.93%	6.46%
G-Sec Vol. (Rs.Cr)	37873	32529	33288	54917
FBIL MIBOR <sup>[1]</sup>	3.40%	3.41%	3.66%	5.25%
3 Month CP Rate	3.18%	3.28%	3.40%	5.50%
5 Year Corp Bond	6.38%	6.46%	6.53%	7.44%
1 Month CD Rate	2.92%	3.09%	3.16%	5.04%
3 Month CD Rate	3.05%	3.07%	3.24%	5.08%
1 Year CD Rate	3.67%	3.74%	3.66%	5.83%

Currency Market			
Currency	20-Nov	Prev_Day	Change
USD/INR	74.16	74.26	-0.10
GBP/INR	98.50	98.27	0.23
EURO/INR	88.15	87.98	0.18
JPY/INR	0.71	0.72	0.00

Commodity Prices				
Commodity	20-Nov	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	41.97	39.91	41.32	56.66
Brent Crude(\$/bl)	42.81	41.19	40.63	65.04
Gold( \$/oz)	1870	1888	1906	1471
Gold(Rs./10 gm)	50199	50738	50766	38305

Source: Refinitiv

[1] Data as on 19 Nov, 2020

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### Derivatives Market

- Nifty Nov 2020 Futures stood at 12,871.30, a premium of 12.25 points above the spot closing of 12,859.05. The turnover on NSE's Futures and Options segment fell to Rs. 20,41,607.80 crore on November 20, 2020, compared with Rs. 65,66,247.21 crore on November 19, 2020.
- The Put-Call ratio stood at 0.9 compared with the previous session's close of 0.93.
- The Nifty Put-Call ratio stood at 1.57 compared with the previous session's close of 1.29.
- Open interest on Nifty Futures stood at 13.82 million, compared with the previous session's close of 13.73 million.

### Indian Debt Market

- Bond yields remained unchanged as investors awaited further clarity on Reserve Bank of India's bond purchases and also domestic country's economic growth data which is due later this month.
- Yield on the 10-year benchmark paper (5.77% GS 2030) remained unchanged at 5.88% from the previous close after trading in the range of 5.87% to 5.89%.
- Banks did not borrow on Nov 20, 2020 under the central bank's marginal standing facility compared with the borrowing of Rs. 140 crore on Nov 19, 2020.

### Currency Market Update

- The Indian rupee rose against the greenback following gains in the domestic equity market.
- The euro rose against the greenback as market participants focused on the possible resumption of talks for additional coronavirus stimulus in U.S. Hopes that a COVID-19 vaccine would be available soon further boosted market sentiments.

### Commodity Market Update

- Gold prices rose as the greenback remained under pressure after the U.S. Treasury Secretary said that negotiations on stimulus measures will continue.
- Brent crude prices rose on optimism regarding the availability of a COVID-19 vaccine.

### International News

- According to a report released by the Conference Board, U.S. leading economic index rose 0.7% in Oct 2020, which is similar to the prior month. The continued advance by the index reflected widespread improvements despite weakness from housing permits and consumers' outlook on economic conditions.
- U.K. retail sales increased 1.2% MoM in Oct 2020, slower than 1.4% rise in Sep 2020. Sales volumes rose for the sixth consecutive as consumers started Christmas shopping earlier this year, underpinned by discounting from a range of stores.
- Japan's consumer prices contracted 0.4% YoY in Oct 2020 compared with no change in Sep 2020. Core consumer prices fell 0.7% YoY in Oct 2020, worse than 0.3% decline in the prior month.

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Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.