

### Indices Performance

Global Indices	05-Oct	Prev_Day	Abs. Change	% Change
Russell 3000	1,764	1,728	36	2.10
Nasdaq	11,332	11,075	257	2.32
FTSE	5,943	5,902	41	0.69
Nikkei	23,312	23,030	282	1.23
Hang Seng	23,768	23,459	309	1.32
Indian Indices	05-Oct	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	38,974	38,697	277	0.71
Nifty 50	11,503	11,417	86	0.76
Nifty 100	11,626	11,546	80	0.69
Nifty 500	9,516	9,462	55	0.58
Nifty Bank	22,371	22,246	125	0.56
S&P BSE Power	1,661	1,663	-3	-0.15
S&P BSE Small Cap	15,028	14,970	58	0.38
S&P BSE HC	20,172	19,886	286	1.44

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
5-Oct	28.56	1.00	33.43	1.38
Month Ago	28.21	1.00	32.49	1.48
Year Ago	26.43	1.23	25.75	1.34

### Nifty 50 Top 3 Gainers

Company	05-Oct	Prev_Day	% Change
TCS	2706	2523	7.23
Wipro	334	313	6.68
Tata Steel	382	365	4.75

### Nifty 50 Top 3 Losers

Company	05-Oct	Prev_Day	% Change
Bajaj Finserv Limited	5881	6054	-2.85
Shree Cements Limited	20132	20611	-2.33
Bharti Airtel	424	432	-1.83

### Advance Decline Ratio

	BSE	NSE
Advances	1464	1041
Declines	1256	862
Unchanged	185	108

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1862	29943
MF Flows**	132	17914

\*5<sup>th</sup> Oct 2020; \*\*1<sup>st</sup> Oct 2020

### Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	6.69% (Aug-20)	6.27% (May-20)	3.28% (Aug-19)
IIP	-10.39% (Jul-20)	-57.30% (Apr-20)	4.90% (Jul-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 01 Oct, 2020

### Global Indices

- Asian markets closed in the green as reports of U.S. President 's improving health eased some of the political uncertainty surrounding the U.S. presidential election in Nov. Optimistic statements by key U.S. officials related to a new \$2.2 trillion stimulus proposal also helped underpin investor sentiment. Today (as on Oct 6) markets are trading high with investors focusing on the health of the U.S. President as he left the hospital to return to the White House, where he will continue being treated for the coronavirus. Both Nikkei and Hang Seng are up 0.35% and 0.37%, respectively.
- European markets closed in the green as prospects of U.S. President's early discharge from hospital, and optimism about a new U.S. coronavirus relief package boosted the risk appetite of the investors.
- U.S. markets went up, as investor sentiments were buoyed by positive reports about U.S. President's health. Faster than expected growth in U.S. service sector in Sep too contributed to the upside.

### Indian Equity Market

- Indian equity markets closed in the green, led by strong buying in the IT sector after one of the industry majors announced a share buyback plan amid expectation of strong earnings in the Jul – Sep quarter of the current fiscal (Q2FY21). Global cues too supported gains following news of health improvement of the U.S. President, which eased some of the political uncertainty caused by his coronavirus infection.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.71% and 0.76% to close at 38,973.70 and 11,503.35 respectively.
- The overall market breadth on BSE was strong with 1,464 scrips advancing and 1,256 scrips declining. A total of 185 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE IT was the major gainer, up 4.06% followed by S&P BSE Teck, up 3.23% and S&P BSE Metal, up 2.31%. S&P BSE Telecom was the major loser, down 1.28% followed by S&P BSE Utilities, down 0.51% and S&P BSE Consumer Durables, down 0.47%.

### Domestic News

- The Goods and Services Tax (GST) Council meeting finalised that from Jan 1, 2021, small taxpayers with annual turnover less than Rs. 5 crore will not be required to file monthly returns. This will reduce their compliance burden from filing 24 returns to 8 returns.
- According to CMIE, investment proposals worth Rs. 58,700 crore were made by the Centre and state governments for the creation of new capacities during Sep quarter of FY21, compared with around Rs. 69,000 crore in the previous quarter, and Rs. 3.94 lakh crore, in the corresponding quarter of last year.
- Data on ECB/FCCB released by the Reserve Bank of India showed, foreign borrowings by Indian companies dropped by over 47% YoY in Aug 2020 to \$1.75 billion compared with a borrowing of \$3.32 billion in August 2019. Out of the total borrowings, USD 1.61 billion was raised through external commercial borrowings (ECB), and remaining \$145.74 million was raised by issuing rupee denominated bonds (RDBs) or masala bonds.
- The central government has paid Rs. 1,082.464 crore to 41,084 farmers for procurement of paddy on Minimum Support Price (MSP). The paddy procurement for FY21 has begun across the procuring states and as on Oct 3, 2020, cumulative procurement of Paddy in Kharif Marketing Season 2020-21 is 5,73,339 MT.
- Dr. Reddy's Laboratories said it was committed to reduce its emissions of greenhouse gases by 55% by 2030. The pharma major has partnered with the Science Based Targets (SBTi) initiative, becoming the first pharmaceutical company in India and the third in Asia to set science-based targets to further mitigate environmental effects.
- Infosys said that the acquisition of GuideVision, an enterprise service management firm specialising in strategic planning, planning, implementation, training and support on the ServiceNow network, based in the Czech Republic, has been completed. Through the acquisition, Infosys is further enhancing its digital capabilities, expanding the cloud services portfolio of Infosys Cobalt and reaffirming its commitment to the growing ecosystem of ServiceNow.

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FII Derivative Trade Statistics		05-Oct	
(Rs Cr)	Buy	Sell	Open Int.
Index Futures	5486.41	4009.94	8637.56
Index Options	324284.32	320907.06	52449.70
Stock Futures	12045.89	12060.60	76868.76
Stock Options	3937.67	3825.06	4410.85
Total	345754.29	340802.66	142366.87

Derivative Statistics- Nifty Options			
	05-Oct	Prev_Day	Change
Put Call Ratio (OI)	1.37	1.57	-0.21
Put Call Ratio(Vol)	0.90	0.98	-0.08

Debt Watch				
	05-Oct	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.42%	3.42%	3.43%	5.19%
T-Repo	3.19%	3.24%	3.02%	4.81%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.23%	3.33%	3.23%	5.18%
364 Day T-Bill	3.55%	3.35%	3.52%	5.40%
10 Year Gilt	6.01%	6.07%	5.95%	6.46%
G-Sec Vol. (Rs.Cr)	20176	20174	33531	64959
FBIL MIBOR <sup>(1)</sup>	3.70%	3.68%	3.71%	5.45%
3 Month CP Rate	3.70%	3.60%	3.45%	6.05%
5 Year Corp Bond	6.74%	6.80%	6.59%	7.38%
1 Month CD Rate	3.26%	3.36%	3.17%	5.24%
3 Month CD Rate	3.39%	3.54%	3.33%	5.41%
1 Year CD Rate	3.83%	4.00%	3.80%	6.23%

Currency Market			
Currency	05-Oct	Prev_Day	Change
USD/INR	73.26	73.38	-0.12
GBP/INR	94.69	94.99	-0.30
EURO/INR	85.90	86.22	-0.32
JPY/INR	0.69	0.70	0.00

Commodity Prices				
Commodity	05-Oct	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	39.07	40.42	39.64	52.79
Brent Crude(\$/bl)	40.01	41.38	40.71	60.02
Gold( \$/oz)	1913	1881	1932	1504
Gold(Rs./10 gm)	50418	49550	50940	38151

Source: Refinitiv

[1] Data as on 01 Oct, 2020

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### Derivatives Market

- Nifty Oct 2020 Futures stood at 11,517.65, a premium of 14.30 points above the spot closing of 11,503.35. The turnover on NSE's Futures and Options segment fell to Rs. 15,62,324.67 crore on October 05, 2020, compared with Rs. 42,43,193.26 crore on October 01, 2020.
- The Put-Call ratio stood at 0.88 compared with the previous session's close of 0.83.
- The Nifty Put-Call ratio stood at 1.37 compared with the previous session's close of 1.57.
- Open interest on Nifty Futures stood at 10.38 million, compared with the previous session's close of 10.19 million.

### Indian Debt Market

- Bond yields stood steady as investors awaited clarity on the Reserve Bank of India's open market operations in the second half of FY21.
- Yield on the 10-year benchmark paper (5.77% GS 2030) stood steady at 6.00% from the previous close after trading in a range of 5.99% to 6.01%.
- Banks borrowed Rs. 40 crore under the central bank's marginal standing facility on Oct 01, 2020 compared with no borrowing on Sep 30, 2020.
- Sundaram Home Finance plans to raise funds selling commercial papers maturing in one year at an annual coupon of 4.86%.

### Currency Market Update

- The Indian rupee dropped against the U.S. dollar on suspected intervention by the Reserve Bank of India through continues dollar-buying by a few state-run lenders amid expectations of more investment flows in the coming sessions.
- Euro rose against the U.S dollar as risk appetite improved on optimism that lawmakers in the U.S. will reach a deal for new stimulus.

### Commodity Market Update

- Gold prices rose on optimism around an additional U.S. stimulus bill.
- Brent crude prices rose amid reports that the U.S. President could soon be discharged from the hospital.

### International News

- Data from the Institute for Supply Management showed that activity in the U.S. service sector unexpectedly grew at a faster rate in Sep 2020. The services PMI rose inched up to 57.8 in Sep 2020 from 56.9 in Aug 2020.
- Survey data from Sentix showed that Eurozone investor confidence dropped marginally in Oct 20 after rising consecutively for five months. The investor confidence index fell to -8.3 in Oct 2020 from -8.0 in Sep 2020.
- Final data from IHS Markit showed that the U.K. services sector witnessed strong growth in Sep 2020. The IHS Markit/Chartered Institute of Procurement & Supply services Purchasing Managers' Index came in at 56.1 as compared to 58.8 a month ago.

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