

Indices Performance

Global Indices	08-Oct	Prev_Day	Abs. Change	% Change
Russell 3000	1,777	1,769	7	0.42
Nasdaq	11,421	11,365	56	0.50
FTSE	5,978	5,946	32	0.53
Nikkei	23,647	23,423	224	0.96
Hang Seng	24,193	24,243	-50	-0.20
Indian Indices	08-Oct	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	40,183	39,879	304	0.76
Nifty 50	11,835	11,739	96	0.82
Nifty 100	11,925	11,834	92	0.77
Nifty 500	9,712	9,655	57	0.59
Nifty Bank	23,191	22,965	227	0.99
S&P BSE Power	1,630	1,634	-4	-0.24
S&P BSE Small Cap	15,010	15,049	-39	-0.26
S&P BSE HC	20,509	20,207	303	1.50

P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
8-Oct	29.57	0.96	34.40	1.34
Month Ago	27.97	1.01	32.44	1.48
Year Ago	26.25	1.23	25.64	1.35

Nifty 50 Top 3 Gainers

Company	08-Oct	Prev_Day	% Change
Wipro Limited	360	335	7.34
Cipla Limited	812	774	4.98
TCS Ltd.	2818	2736	3.02

Nifty 50 Top 3 Losers

Company	08-Oct	Prev_Day	% Change
GAIL (India) Ltd	84	87	-3.11
ONGC Ltd	69	71	-2.77
ITC Ltd.	167	170	-1.42

Advance Decline Ratio

	BSE	NSE
Advances	1207	828
Declines	1490	1061
Unchanged	150	106

Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1020	32365
MF Flows**	-1106	14583

*8th Oct 2020; **7th 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 07 Oct, 2020

Global Indices

- Asian markets closed in the green amid renewed optimism about small aid packages after U.S. President said that he would support relief measures for airlines and small businesses. Today (as on Oct 9), markets are trading mixed as investors awaited the release of a private survey of China's services sector activity for Sep. While Nikkei is down 0.04%, Hang Seng is up 0.62% (as at 8:00 AM IST).
- European markets went up amid optimism about a partial fiscal stimulus in the U.S.
- U.S. markets extended the rally as investors remained optimistic about a coronavirus stimulus bill following the latest comments from U.S. President.

Indian Equity Market

- Indian equity markets edged higher led by gains in the information technology sector. Strong buying was witnessed in the stocks of one of the industry behemoths in the IT sector after its management said the space is geared up for a multi-year technology transformation cycle. It added that in the current phase, enterprises are building a cloud-based foundation that will serve as a resilient, secure and scalable digital core.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.76% and 0.82% to close at 40,182.67 and 11,834.60 respectively.
- The overall market breadth on BSE was weak with 1,207 scrips advancing and 1,490 scrips declining. A total of 150 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE IT was the major gainer, up 2.99% followed by S&P BSE Teck, up 2.73% and S&P BSE Healthcare, up 1.5%. S&P BSE Energy was the major loser, down 0.81% followed by S&P BSE Oil & Gas, down 0.69% and S&P BSE Capital Goods, down 0.51%.

Domestic News

- The World Bank said that India's Gross Domestic Product (GDP) is forecasted to contract 9.6% in FY21. The fall reflects the national lockdown and the income shock experienced by households and firms due to the COVID-19 pandemic. The Bank noted the country's economic situation is "much worse" than ever seen before.
- Finance Minister said, total of 33 housing projects with an investment of Rs. 4,197 crore have been given final approval under the Special Window for Affordable and Mid-Income Housing fund. This will lead to the completion of 25,048 home units.
- According to a report by the Council of Energy, Environment & Water, although India successfully provided metered electricity connections to 97% households, but hardly 25% are aware of energy efficient appliances. The report also pointed out shortcomings in the awareness programmes organised by the Bureau of Energy Efficiency.
- Agriculture Secretary said farmers planted Kharif crops on 28 lakh hectare more than the previous record of 1,085 lakh hectares. Pulses, oilseeds and rice has been sown in an additional 7, 18 and 4 lakh hectares, he added.
- Toyota Kirloskar Motor (TKM) said that it has joined hands with Myles Automotive Technologies in Delhi NCR, Mumbai, and Bengaluru to extend its car subscription service for individual customers.
- Infosys, a major IT services company, said it would acquire up to \$125 million from Blue Acorn iCI, an Adobe Platinum partner in the U.S., and a provider of digital customer experience, commerce and analytics.

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FII Derivative Trade Statistics		08-Oct	
(Rs Cr)	Buy	Sell	Open Int.
Index Futures	3561.06	2779.64	9878.03
Index Options	272839.06	273553.14	72461.45
Stock Futures	13324.12	13590.94	78618.71
Stock Options	6070.65	6093.53	5846.47
Total	295794.89	296017.25	166804.66

Derivative Statistics- Nifty Options			
	08-Oct	Prev_Day	Change
Put Call Ratio (OI)	1.46	1.58	-0.13
Put Call Ratio(Vol)	1.03	0.95	0.08

Debt Watch				
	08-Oct	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.43%	3.44%	3.39%	5.12%
T-Repo	3.22%	3.21%	3.17%	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	3.25%	3.23%	3.40%	5.20%
364 Day T-Bill	3.45%	3.58%	3.52%	5.36%
10 Year Gilt	6.01%	6.00%	6.00%	6.48%
G-Sec Vol. (Rs.Cr)	17845	29143	37930	27528
FBIL MIBOR ^[1]	3.65%	3.70%	3.75%	5.21%
3 Month CP Rate	3.60%	3.50%	3.45%	6.05%
5 Year Corp Bond	6.79%	6.70%	6.78%	7.43%
1 Month CD Rate	3.29%	3.27%	3.23%	5.14%
3 Month CD Rate	3.37%	3.43%	3.39%	5.31%
1 Year CD Rate	3.78%	3.86%	3.79%	6.19%

Currency Market			
Currency	08-Oct	Prev_Day	Change
USD/INR	73.29	73.36	-0.07
GBP/INR	94.88	94.63	0.25
EURO/INR	86.33	86.16	0.16
JPY/INR	0.69	0.69	0.00

Commodity Prices				
Commodity	08-Oct	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	40.99	38.46	36.82	52.59
Brent Crude(\$/bl)	41.55	39.13	37.98	59.03
Gold(\$/oz)	1893	1905	1931	1505
Gold(Rs./10 gm)	50180	50249	50967	38043

Source: Refinitiv

[1] Data as on 07 Oct, 2020

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Derivatives Market

- Nifty Oct 2020 Futures stood at 11,831.80, a discount of 2.80 points below the spot closing of 11,834.60. The turnover on NSE's Futures and Options segment rose to Rs. 46,09,853.47 crore on October 08, 2020, compared with Rs. 23,42,833.63 crore on October 07, 2020.
- The Put-Call ratio stood at 0.95 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 1.58.
- Open interest on Nifty Futures stood at 12.57 million, compared with the previous session's close of 11.72 million.

Indian Debt Market

- Bond yields stood almost unchanged in thin trade, as investors awaited the decision of the rate-setting Monetary Policy Committee on Oct 09, 2020.
- Yield on the 10-year benchmark paper (5.77% GS 2030) rose 1 bps to close at 6.02% compared to the previous close of 6.01% after trading in a range of 6.01% to 6.03%.
- Banks did not borrow under the central bank's marginal standing facility on Oct 06, 2020 and Oct 07, 2020.
- RBI announced to conduct underwriting auction of 5.09% GS 2022, 5.77% GS 2030, GOI FRB 2033 and 6.80% GS 2060 for notified amount of Rs. 28,000 crore through multiple price-based method on Oct 9, 2020.

Currency Market Update

- The Indian rupee rose against the U.S. dollar supported by a continuous rally in domestic equity market since the start of the week.
- Euro eased against the U.S. dollar as market participants awaited for fresh news on whether new U.S. fiscal stimulus is likely in the near term. Euro closed at \$1.1758, down 0.02% compared with the previous close of \$1.1760

Commodity Market Update

- Gold prices rose amid uncertainty over the upcoming U.S. Presidential elections.
- Brent crude prices rose as oil workers evacuated rigs in the U.S. Gulf of Mexico ahead of Hurricane Delta.

International News

- Data from the U.S. Labour Department showed that initial jobless claims in U.S. for the week ended Oct 3 fell by 9,000 to 840,000 from the previous week's revised level of 849,000 (837,000 originally reported for the previous week).
- A report from the Bank of France showed that the gross domestic product of France grew 16% on a quarterly basis in the third quarter of 2020 following a decline of 13.8% in the second quarter of 2020.
- Survey data from Cabinet Office showed that the current conditions index of the Economy Watchers' Survey, which measures the current situation of the economy and is a measure of the public assessment of the Japanese economy increased notably to 49.3 in Sep 2020 from 43.9 in Aug 2020.

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