



## Domestic Markets

Indices	Last Trade	Pts chg	% chg
NIFTY50	11247.55	25.15	0.22
SENSEX	38067.93	94.71	0.25
BANK NIFTY	21451.80	40.50	0.19
BSE MIDCAP	14705.17	7.90	0.05
BSE SMLCAP	14867.36	6.18	0.04
BSE-100	11391.75	25.02	0.22
BSE-200	4781.63	11.12	0.23
BSE-500	14851.00	31.43	0.21

## Asian Indices

INDICES	Last Trade	Pts chg	% chg
SHANGHAI	3,218.05	-6.31	-0.20
HANGSENG	23,459.05	183.52	0.78
NIKKEI 225	23,185.12	-353.98	-1.53
KLSE	1,504.82	0.92	0.06
KOSPI	2,327.89	19.81	0.85
STRAITS TIMES	2,466.62	-4.99	-0.20
TAIWAN	12,515.61	47.88	0.38

## Sectoral Indices

INDEX	Last Trade	Pts chg	% chg
AUTO	17876.44	-39.96	-0.22
BANKEX	24354.70	42.57	0.18
METAL	8304.23	-162.52	-1.92
OIL AND GAS	12242.39	-236.70	-1.90
CAPITAL GOODS	13834.15	135.66	0.99
HEALTHCARE	19799.24	87.96	0.45
TECK	9213.19	-16.22	-0.18
CONSUMER DURABLES	24278.09	410.79	1.72
IT	19979.89	48.02	0.24

## Market Wrap-Up

Indian equity indices ended with minor gains on Tuesday. The Sensex closed marginally higher by 94.71 points or 0.25% to settle at 38,067.93 levels while Nifty closed higher by just 25.15 points or 0.22% to close at 11,247.55. About 1,226 shares advanced, 1,388 shares declined, and 157 shares were unchanged. Among the BSE sectoral indices, gains in pharmaceutical and auto stocks capped losses as the financial stocks tumbled. BSE Small-Cap index closed flat by 0.04%, whereas BSE Mid-Cap index gained by 0.05%.

In global markets, Asian indices such as Shanghai index and Nikkei closed lower by 0.20 % and 1.53 %, respectively.

## Sector and Economic Update

India's infrastructure output fell by 8.5% y-o-y in August 2020. Following a downwardly revised 8% drop in July. It is the 6th straight plunge in infrastructure output. All sectors showed a decline in production except fertilizers and coal. Declines were seen in refinery products (-19.1 % vs -13.9 %); electricity (-2.7 % vs -2.5 %); steel (-6.3 % vs -8.3 %); crude oil (-6.3 % vs -4.9 %); natural gas (-9.5 % vs -10.2 %); and cement (-14.6 % vs -13.5 %). On the other hand, coal production rebounded (3.6 % vs -5.7 %) and the output for fertilizers rose faster (7.3% vs 6.9 %). Considering the first five months of this fiscal year that started on April 1st, industrial output shrank 17.8% compared to a 2.5% expansion for the same period previous year.

## Corporate Update

- Government of India (GoI) has extended the last date for submission of Expression of Interest (EOI) for strategic divestment of BPCL to 16<sup>th</sup> November 2020. GoI holds 52.98% stake in BPCL as on 30<sup>th</sup> September 2020.
- Ramco Systems has signed up an agreement with a Global Top 5 logistics major for modernizing and transforming its multi-country Payroll operations on Ramco's Global Payroll platform. The company will be unifying its payroll operations for 15 countries across Middle East & Africa. With this win, Ramco Global Payroll is now trusted by two of the top 10 third party logistics companies, globally.
- Tata Consumer Product (TCPL) is likely to offer Rs.1000 crore to take over the vending machine business of Coffee Day enterprise Ltd. (CDEL). But CDEL has put a Rs.2000 crore tag on its vending machine operations. TCPL reported consolidated revenue of Rs.9600 crore for FY20.
- After Silver Lake and KKR, now General Atlantic, a global growth equity firm will invest Rs.3675 crore into Reliance Retail Venture, a subsidiary of Reliance Industries. This investment values Reliance Retail at a pre-money equity value of Rs.4.285-lakh crore. General Atlantic's investment will translate into a 0.84% stake in RRVL on a fully diluted basis.

## Technical Trading Calls

### *Indices*

Indices	Close	R1	R2	S1	S2
Sensex	38067.93	38250	38420	37900	37730
Nifty	11247.55	11300	11350	11200	11150

### *Stocks*

Scrip	Close	Call	Stop Loss	Target
Grasim Industries Ltd.	743.95	BUY	727.00	765.00
Tech Mahindra Ltd.	790.00	BUY	775.00	810.00
Polyplex Corporation	700.05	BUY	675.00	735.00
Apollo Hospitals	2148.05	BUY	2098.00	2200.00
Astral Poly Technik Ltd.	1224.80	BUY	1188.00	1270.00

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## Derivative Trends

### Increase In Open Interest & Increase In Price

Company	OI	% Chg OI	Curr Price	% Chg
CADILAHC	7,508,600	18.14	398.00	2.21
TATAMOTORS	72,880,200	1.22	134.25	1.47
DABUR	11,000,000	8.49	512.05	2.40
WIPRO	24,291,200	2.14	315.00	0.72
TECHM	12,644,400	2.71	793.95	2.78

### Increase In Open Interest & Decrease In Price

Company	OI	% Chg OI	Curr Price	% Chg
SAIL	46,911,000	9.10	33.85	-5.45
BPCL	26,443,800	15.41	353.60	-9.05
BHARTIARTL	121,527,405	1.99	421.25	-3.84
BHEL	64,218,000	3.28	29.50	-2.80
COALINDIA	44,477,700	4.42	116.50	-1.60

### Decrease In Open Interest & Increase In Price

Company	OI	% Chg OI	Curr Price	% Chg
ITC	130,720,000	-0.51	172.65	1.32
ZEEL	34,125,000	-1.44	211.30	1.27
CANBK	11,120,000	-3.39	88.15	0.46
HDFC	26,787,000	-1.41	1739.10	1.24
MCDOWELL-N	15,131,250	-1.71	518.00	0.69

### Decrease In Open Interest & Decrease In Price

Company	OI	% Chg OI	Curr Price	% Chg
GMRINFRA	63,720,000	-3.61	23.00	-0.65
VEDL	117,973,600	-1.74	137.20	-2.21
FEDERALBNK	72,692,000	-2.57	48.65	-1.62%
GAIL	23,051,900	-6.14	86.30	-1.65
HINDALCO	27,950,000	-4.98	174.85	-1.19

## FII F&O Statistics

	BUY		SELL		NET Buy/(Sell) Value (Rs. In Cr)
	No. of Contracts	Value (Rs. In Cr)	No. of Contracts	Value (Rs. In Cr)	
<b>INDEX FUTURES</b>	46051	3146.54	57164	3790.3	-643.76
<b>INDEX OPTIONS</b>	2965328	189169.89	2981343	190260.09	-1090.2
<b>STOCK FUTURES</b>	194996	14470.76	192253	14337.78	132.98
<b>STOCK OPTIONS</b>	45434	3573.01	45305	3573.65	-0.64

## FII Investments on 30<sup>th</sup> September 2020 (Data relates to previous trading day)

Debt/Equity	Investment Route	Gross Purchases (Rs. Cr)	Gross Sales (Rs. Cr)	Net Investment (Rs. Cr)	Net Investment US(\$ million)	Conversion
						(1 USD TO INR)
Equity	Stock Exchange	4345.15	5722.30	-1377.15	-186.47	Rs. 73.8521
	Primary market & others	311.45	0.23	311.22	42.14	
	Sub-total	4656.60	5722.53	-1065.93	-144.33	
Debt	Stock Exchange	117.24	380.98	-263.74	-35.71	
	Primary market & others	717.50	562.62	154.88	20.97	
	Sub-total	834.74	943.60	-108.86	-14.74	
<b>Total</b>		<b>5491.34</b>	<b>6666.13</b>	<b>-1174.79</b>	<b>-159.07</b>	

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