



01 Sep.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 11,388 | 0.0 % | 38.0 % |
| BSE SENSEX | 38,628 | (2.1) % | 36.7 % |
| CNX BANK | 23,754 | 0.0 % | 30.5 % |
| CNX MIDCAP | 16,683 | 0.0 % | 45.4 % |
| CNX SMALLCAP | 5,589 | 0.0 % | 57.8 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 28,430 | (0.8) % | (0.4) % |
| S&P 500 | 3,500 | (0.2) % | 8.3 % |
| FTSE 100 | 5,964 | (0.6) % | (21.6) % |
| HANG SENG | 25,177 | (1.0) % | (11.8) % |
| NIKKEI | 23,140 | 1.1 % | (0.3) % |
| SHANGHAI COMPOSITE | 3,396 | (0.2) % | 10.1 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 72.96 | (1.6) % | 2.5 % |
| EUR/USD | 1.19 | 0.7 % | 6.1 % |
| GBP/USD | 1.33 | 1.4 % | 1.2 % |
| USD/JPY | 105.40 | (0.8) % | (3.0) % |
| USD/AUD | 1.36 | (2.1) % | (4.8) % |
| USD/SGD | 1.36 | (0.7) % | 0.9 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 43 | (0.8) % | (30.4) % |
| Gold(INR/10g) | 51,353 | 0.7 % | 31.7 % |
| Gold Comex(USD/oz) | 1,949 | 0.0 % | 26.3 % |
| SILVER(INR/1Kg) | 65,930 | 2.0 % | 43.2 % |
| Aluminium(USD/MT) | 1,762 | 35.5 % | (0.6) % |
| Copper(USD/MT) | 6,728 | 1.9 % | 9.1 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 0.7 | 0.0 % | (1.2) % |

Global Economy: The US Federal Reserve vice chairman Richard Clarida strengthened expectations that monetary policy will remain accommodative for a prolonged period, The manufacturing sector in China continued to expand in August, albeit at a slower pace, the latest survey from the National Bureau of Statistics said on Monday with a manufacturing PMI score of 51.0. The latest data shows a decline from 51.1 in July though it remains above the level of 50 that separates expansion from contraction. The NBS also said on Monday that its non-manufacturing index came at 55.2, up from 54.2 in the previous month. Germany's consumer prices remained flat in August, preliminary data from Destatis revealed Monday. The consumer price index was unchanged from last year, following a 0.1% drop in July. Industrial output in Japan rose to a seasonally adjusted 8% on month in July, the Ministry of Economy, Trade and Industry (METI) said on Monday. That beat forecasts for a gain of 5.8% and was up from 1.9% in June. On a yearly basis, industrial production fell 16.1% after tumbling 18.2% in the previous month. The METI upgraded its assessment of industrial production, saying that it is showing signs of picking up.

Global Equities: US stocks saw corrective action on last trading day of the month. Energy stocks pulled back.

Indian Economy: India's GDP contracted by 23.9% in the first quarter i.e Q1FY21 compared to the same period last year, marking the worst quarterly contraction on record. The Reserve Bank will conduct additional special open market operation involving the simultaneous purchase and sale of Government securities for an aggregate amount of Rs 20,000 crore in two tranches of Rs 10,000 crore each. The auctions would be conducted on September 10, 2020 and September 17, 2020. The RBI remains committed to conduct further such operations as warranted by market conditions. India's core sector shrank at a slower speed in July than in June. The core sector contracted 9.6% in the month of July, after 12.9% contraction seen a month ago. The production of eight core sectors had expanded by 2.6% in July 2019. India's fiscal deficit stood at Rs 8.21 lakh crore, or 103.1% of the budgeted target for the current fiscal year.

Equity Markets: Key domestic benchmarks ended sharply lower on Monday, snapping a six-day rising streak. Rising COVID-19 cases, Sebi's new margin rule and India-China geopolitical tension weighed on stocks. Sentiment in local market was dented after the media reported that fresh clashes broke out between Indian and Chinese troops at Pangong in Ladakh near Line of Actual Control on the intervening night of 29-30 August.

Corporate News: L&T completed divestment of its electrical and automation operations to Schneider Electric. Oil and Natural Gas Corporation (ONGC) will be in focus ahead of its June quarter earnings. Biocon and Mylan launched insulin drug Semglee in the US market. Vedanta Ltd said it has tied up with State Bank of India for a long-term syndicated loan facility worth Rs 10,000 crore.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 65.1 | 320.8 | 116.1 |
| MF(INR cr) | (118.1) | (465.5) | (200.5) |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 5,098 | 57,323 | 55,715 |
| F&O(INR cr) | 2,348,238 | 1,877,589 | 1,607,672 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 26.4 | 23.0 | 30.7 |
| NSE VIX | 22.8 | 21.2 | 31.0 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 23,754 | (3.1) % | 30.5 % | Energy | 15,605 | (2.3) % | 44.9 % |
| IT | 17,929 | (1.1) % | 48.8 % | Pharma | 11,080 | (4.7) % | 57.7 % |
| Metals | 2,421 | (4.0) % | 55.8 % | Finance | 11,389 | (2.8) % | 27.4 % |
| Auto | 7,840 | (3.3) % | 68.3 % | PSU | 1,525 | (4.8) % | 18.9 % |
| FMCG | 30,595 | (2.1) % | 16.1 % | Real Estate | 223 | (4.4) % | 29.4 % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| ONGC | 82 | 2.0 % | 24.6 % | NMDC | 97 | (9.6) % | 23.7 % |
| Interglobe | 1,199 | 1.3 % | 20.0 % | Piramal En | 1,367 | (9.5) % | 46.0 % |
| TCS | 2,257 | 0.8 % | 32.1 % | Shriram Tr | 702 | (9.1) % | 15.5 % |
| Tata Motor | 143 | 0.3 % | 110.7 % | Bosch | 12,814 | (8.5) % | 38.7 % |
| HDFC Bank | 1,116 | 0.1 % | 34.5 % | DLF | 158 | (8.5) % | 19.5 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

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