



01 Sep.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,186	0.3 %	15.6 %
BSE SENSEX	57,552	1.2 %	15.5 %
CNX BANK	36,591	0.5 %	8.1 %
CNX MIDCAP	28,589	0.6 %	18.5 %
CNX SMALLCAP	10,314	0.5 %	24.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,361	(0.1) %	15.5 %
S&P 500	4,523	(0.1) %	20.4 %
FTSE 100	7,120	(0.4) %	8.3 %
HANG SENG	25,879	1.3 %	(5.8) %
NIKKEI	28,090	1.1 %	3.0 %
SHANGHAI COMPOSITE	3,544	0.5 %	1.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.22	(1.1) %	0.4 %
EUR/USD	1.18	0.3 %	(3.8) %
GBP/USD	1.38	0.2 %	0.8 %
USD/JPY	109.86	(0.2) %	6.5 %
USD/AUD	1.37	(0.6) %	5.6 %
USD/SGD	1.35	(0.6) %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	(1.0) %	43.8 %
Gold(INR/10g)	47,106	0.2 %	(7.7) %
Gold Comex(USD/oz)	1,818	0.1 %	(6.7) %
SILVER(INR/1Kg)	63,646	1.0 %	(7.6) %
Aluminium(USD/MT)	2,714	1.5 %	34.8 %
Copper(USD/MT)	9,463	1.2 %	19.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.0 %	0.4 %

Global Economy: The US Conference Board said its consumer confidence index tumbled to 113.8 in August from a downwardly revised 125.1 in July. The index slumped to its lowest level since hitting 95.2 in February of 2021. The official China manufacturing Purchasing Manager's Index (PMI) was 50.1 in August from 50.4 in July, data from the National Bureau of Statistics (NBS) showed on Tuesday. The 50-point mark separates growth from contraction. China's services sector activity contracted in August to the second-lowest level on record, further adding to evidence of a slowing economy. The official non-manufacturing PMI - which measures morale in the services and construction sectors - fell to 47.5 in August, from 53.3 in July, data from the National Bureau of Statistics (NBS) showed on Tuesday. The figure is lowest since the index slumped to an all-time low of 29.6 in February 2020. Eurozone inflation surged to a near 10-year high in August, flash data from Eurostat showed on Tuesday. Inflation rose to 3% in August from 2.2% in July. This was the highest since November 2011 and also exceeded the European Central Bank's 2% target. Germany's jobless rate dropped marginally in July, data from Destatis revealed on Tuesday. The jobless rate fell to a seasonally adjusted 3.6% in July from 3.7% in June. The UK mortgage approvals declined to one-year low in July. Approvals for house purchases, an indicator of future borrowing, decreased further in July to 75,152 from 80,272 in June.

Global Equities: The US stocks ended modestly lower. Trading activity was subdued overall.

Indian Economy: India's economy saw a record growth in the three months to June, largely due to extremely low base in the same period last year when the coronavirus pandemic and resultant lockdowns hurt economic activity. Gross domestic product grew 20.1% year-on-year in the April to June quarter versus a 24.4% contraction in the same period of the fiscal year 2020-21, preliminary estimates from the statistics ministry showed Tuesday. The quarterly gross value added also jumped 18.8% year-on-year versus a 22.4% drop in the same quarter last year. The combined Index of Eight Core Industries came in at 134.0 in July 2021, marking a spurt of 9.4% (provisional) as compared to the Index of July 2020.

Equity Markets: Key equity indices extended record closing spree on Tuesday. The Nifty closed above 17,100 mark for the first time. Barring the Nifty Media index, all the sectoral indices on the NSE ended in the green. The Sensex hit record high of 57,625.26 while the Nifty hit all time high of 17,153.50 in late trades.

Corporate News: Wipro and HERE Technologies, the location data and technology platform, announced that they are partnering to offer location-based services, to customers from Energy & Utilities, Manufacturing, Transport & Logistics, Telecom and Automotive industry verticals. Shares of Maruti Suzuki India will be in focus. Owing to a supply constraint of electronic components due to the semiconductor shortage situation, the company is expecting an adverse impact on vehicle production in the month of September in both Haryana and its contract manufacturing company, Suzuki Motor Gujarat Pvt. Ltd. (SMG) in Gujarat. Though the situation is quite dynamic, it is currently estimated that the total vehicle production volume across both locations could be around 40% of normal production.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	233.3	33.0	(3.3)
MF(INR cr)	(289.6)	572.0	438.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	89,083	62,282	70,412
F&O(INR cr)	5,563,111	5,739,759	4,954,742

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.2	17.2	17.7
NSE VIX	14.5	13.2	16.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	36,425	0.2 %	7.6 %	Energy	20,290	0.2 %	9.6 %
IT	34,570	1.4 %	33.1 %	Pharma	14,345	0.9 %	15.9 %
Metals	5,715	1.5 %	36.4 %	Finance	18,071	1.3 %	13.6 %
Auto	10,034	0.8 %	0.1 %	PSU	2,335	0.7 %	5.4 %
FMCG	39,530	1.0 %	13.3 %	Real Estate	387	0.6 %	15.2 %

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>
Bharti Air	664	7.0 %	27.5 %	Tata Motor	287	(1.6) %	(6.6) %
Bajaj Fina	7,525	5.0 %	42.7 %	Nestle Ind	19,468	(1.4) %	14.0 %
Adani Tran	1,581	5.0 %	58.2 %	IndusInd B	992	(1.3) %	(0.1) %
Eicher Mot	2,679	4.9 %	1.8 %	Petronet L	228	(1.2) %	(0.1) %
Adani Ente	1,588	4.7 %	43.4 %	NMDC	154	(1.0) %	11.3 %

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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