



02 Sep.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,470	0.0 %	39.0 %
BSE SENSEX	38,901	0.7 %	37.6 %
CNX BANK	23,812	0.0 %	30.8 %
CNX MIDCAP	16,819	0.0 %	46.6 %
CNX SMALLCAP	5,609	0.0 %	58.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,646	0.8 %	0.4 %
S&P 500	3,527	0.8 %	9.2 %
FTSE 100	5,862	(1.7) %	(22.9) %
HANG SENG	25,185	0.0 %	(11.8) %
NIKKEI	23,138	(0.0) %	(0.3) %
SHANGHAI COMPOSITE	3,411	0.4 %	10.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.26	(0.7) %	2.9 %
EUR/USD	1.19	0.9 %	6.3 %
GBP/USD	1.33	1.1 %	1.2 %
USD/JPY	105.80	(0.4) %	(2.6) %
USD/AUD	1.36	(1.6) %	(4.8) %
USD/SGD	1.36	(0.5) %	1.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	0.4 %	(30.1) %
Gold(INR/10g)	51,521	0.3 %	32.1 %
Gold Comex(USD/oz)	1,985	1.8 %	28.7 %
SILVER(INR/1Kg)	68,067	3.2 %	47.8 %
Aluminium(USD/MT)	1,782	1.1 %	0.5 %
Copper(USD/MT)	6,789	0.9 %	10.1 %

**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	(0.1) %	(1.3) %

**Global Economy:** The Institute for Supply Management or ISM said its purchasing managers index (PMI) rose to 56.0 in August from 54.2 in July, with a reading above 50 indicating growth in manufacturing activity. The US construction spending edged up by 0.1% to an annual rate of \$1.365 trillion in July after falling by 0.5% to a revised rate of \$1.363 trillion in June. China manufacturing sector continued to expand in August, with a manufacturing PMI score of 53.1, the latest survey from Caixin revealed on Tuesday. That's up from 52.8 in July, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Individually, the sector saw the sharpest increase in output and new orders since 2011. Euroarea unemployment rate rose to 7.9% in July from 7.7% in June, despite some relaxation of covid-19 containment measures, data from Eurostat revealed. The euro area manufacturing sector grew at a moderate pace, as initially estimated, in August despite the severe constraints on economic activity related to fighting the global coronavirus disease, final survey data from IHS Markit showed. The manufacturing PMI eased to 51.7 in August from 51.8 in July, matching the flash estimate. The recovery in the Australian manufacturing sector extended in August but the pace of growth slowed, survey data from IHS Markit and Commonwealth Bank showed Tuesday. The manufacturing PMI fell to 53.6 in August from 54.0 in July.

**Global Equities:** The US stocks extended gain amid supportive economic cues. Tech stocks moved up sharply.

**Indian Economy:** The headline seasonally adjusted IHS Markit India Manufacturing Purchasing Managers' Index stood at 52 in August 2020 from 46.0 in July signalling an improvement in operating conditions across the manufacturing sector following four consecutive months of contraction. Markit said that employment continued to fall despite signs of capacity pressures, as firms struggled to find suitable workers. The rate of input price inflation was solid, following four monthly declines in cost burdens. Firms, however, continued in their efforts to drive sales amid greater competitive pressure and reduced their selling prices further.

**Equity Markets:** Benchmark indices ended with decent gains on Tuesday, rebounding from yesterday's selloff. Telecom stocks witnessed action after the Supreme Court pronounced its verdict on AGR case. Decent monthly auto sales data also supported sentiment.

**Corporate News:** Coal India said its August month provisional Coal offtake rose to 44.3 million tonnes versus 40.6 million tonnes YoY. Hero MotoCorp will be in focus as it said sales in August 2020 jumped to 5.84 lakh units versus 5.43 lakh units YoY. Banking stocks will be in focus as the Centre informed the Supreme Court that moratorium on repayment of loans allowed during the Covid-19 crisis can be extended by up to two years.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(320.4)	290.3	111.9
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)	65,289	65,289	55,808
F&O(INR cr)	1,998,166	1,998,166	1,611,426

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.1	26.1	30.7
NSE VIX	21.8	21.8	30.9

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,812	0.2 %	30.8 %	Energy	15,673	0.4 %	45.5 %
IT	17,814	(0.6) %	47.9 %	Pharma	11,340	2.3 %	61.4 %
Metals	2,497	3.1 %	60.7 %	Finance	11,494	0.9 %	28.5 %
Auto	7,886	0.6 %	69.3 %	PSU	1,522	(0.2) %	18.6 %
FMCG	30,988	1.3 %	17.6 %	Real Estate	225	0.8 %	30.4 %

### 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>
Biocon	405	7.8 %	45.6 %	Bharti Inf	189	(4.9) %	21.7 %
Bharti Air	546	6.5 %	29.6 %	Bosch	12,393	(3.3) %	34.2 %
JSW Steel	287	6.3 %	100.6 %	O N G C	79	(3.2) %	20.7 %
Hindalco I	194	4.8 %	111.7 %	Bank of Ba	48	(2.9) %	(7.2) %
Bajaj Fina	3,644	4.5 %	64.2 %	Axis Bank	486	(2.2) %	35.4 %

### EVENTS CALENDAR

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

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