



03 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,556	0.2 %	40.0 %
BSE SENSEX	39,086	0.5 %	38.4 %
CNX BANK	23,837	(0.2) %	30.9 %
CNX MIDCAP	17,160	0.5 %	49.6 %
CNX SMALLCAP	5,748	0.7 %	62.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,101	1.6 %	2.0 %
S&P 500	3,581	1.5 %	10.8 %
FTSE 100	5,941	1.4 %	(21.9) %
HANG SENG	25,120	(0.3) %	(12.0) %
NIKKEI	23,247	0.5 %	0.2 %
SHANGHAI COMPOSITE	3,405	(0.2) %	10.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.94	(0.0) %	2.4 %
EUR/USD	1.20	0.4 %	6.6 %
GBP/USD	1.34	0.5 %	1.7 %
USD/JPY	105.86	0.4 %	(2.6) %
USD/AUD	1.35	(0.3) %	(5.0) %
USD/SGD	1.36	0.1 %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	0.4 %	(30.1) %
Gold(INR/10g)	51,088	(0.8) %	31.0 %
Gold Comex(USD/oz)	1,944	(2.0) %	26.0 %
SILVER(INR/1Kg)	65,445	(3.9) %	42.1 %
Aluminium(USD/MT)	1,779	(0.2) %	0.4 %
Copper(USD/MT)	6,719	(1.0) %	9.0 %

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) %	(1.3) %

Global Economy: Payroll processor ADP said US private sector employment increased by 428,000 jobs in August after rising by an upwardly revised 212,000 jobs in July. The Commerce Department said factory orders jumped by 6.4% in July, matching the upwardly revised spike seen in June. Economic activity in the U.S. has increased over the past several weeks, according to the Federal Reserve's Beige Book, although the gains were described as generally modest. The Beige Book, a compilation of anecdotal evidence on economic conditions in the twelve Fed districts, also noted economic activity remains well below levels prior to the COVID-19 pandemic. Eurozone producer prices continued to drop in July but the pace of annual fall slowed, data from Eurostat showed Wednesday. Producer prices fell 3.3% year-on-year in July, following a 3.7% decrease in June. Germany's retail sales dropped for a second straight month in July even after the coronavirus pandemic-related lockdown curbs were eased. Retail sales fell 0.9% month-on-month and decline for June was revised to 1.9% from 1.6% earlier. On a year-on-year basis, retail sales rose 4.2% in July after a 6.7% rise in June, which was revised from 5.9%. UK house prices advanced by 2% on month in August, faster than the 1.8% rise seen in the previous month, as the property market showed signs of recovery following the easing of lockdown restrictions, data from Nationwide Building Society showed Wednesday. The coronavirus pandemic has officially pushed Australia into its first recession in nearly three decades. The country's GDP contracted 7% in the second quarter compared to the prior one, the Australian Bureau of Statistics (ABS) said.

Global Equities: The US stocks rose further with Nasdaq and S&P 500 hitting new record intraday highs yet again.

Indian Economy: India continues to report one of the lowest COVID Case Fatality Rates (CFR) when compared to several other countries. While the global CFR stands at 3.3% as on date, the comparative figure for India is 1.76%, an official update noted today. The deaths per million population in India is one of the lowest in the world. While the global average is 110 deaths /million population, India is reporting 48 deaths /million population. The comparative figure for Brazil and the UK is 12 and 13 times higher, respectively. Union Cabinet chaired by the Prime Minister, Narendra Modi has approved for signing of a Memorandum of Understanding between Textiles Committee, India and M/s Nissenken Quality Evaluation Centre, Japan for improving quality and testing of Indian textiles and Clothing for the Japanese market.

Equity Markets: Key equity indices ended with decent gains on Wednesday backed by positive global sentiment. The Nifty ended below 11,550 level after briefly scaling that level in intraday. In the broader market, the S&P BSE Mid-Cap index jumped 1.26% while the S&P BSE Small-Cap index climbed 1.66%. Both these indices outperformed the Sensex.

Corporate News: Engineers India Ltd will be in focus as the company received an order worth Rs 450 crore from GAIL. TVS Motor Company invested a sum of Rs 30 crore in electric vehicle maker Ultraviolette Automotive for an undisclosed stake as part of the latter's series B round of fundraising, the company announced. Local Oil Marketing Companies could stay supported following a more than 3% drop in WTI Crude oil futures yesterday.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	78.8	78.8	111.5
MF(INR cr)	(263.9)	(263.9)	(190.0)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	52,865	59,077	55,780
F&O(INR cr)	2,011,400	2,004,783	1,615,236

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.6	26.3	30.6
NSE VIX	21.1	21.5	30.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,875	0.3 %	31.1 %	Energy	15,857	1.2 %	47.2 %
IT	18,077	1.5 %	50.1 %	Pharma	11,404	0.6 %	62.3 %
Metals	2,541	1.8 %	63.6 %	Finance	11,491	(0.0) %	28.5 %
Auto	7,977	1.2 %	71.3 %	PSU	1,515	(0.4) %	18.1 %
FMCG	31,084	0.3 %	17.9 %	Real Estate	226	0.6 %	31.2 %

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>
United Bre	1,085	8.1 %	21.9 %	Bajaj Auto	2,881	(2.6) %	40.4 %
Zee Entert	218	8.1 %	80.4 %	Shriram Tr	692	(2.0) %	13.9 %
M & M	643	5.8 %	135.6 %	Asian Pain	1,944	(1.8) %	21.3 %
Info Edg.(3,474	5.2 %	72.5 %	Hero Motoc	2,944	(1.7) %	79.5 %
Bosch	12,954	4.5 %	40.3 %	NHPC Ltd	21	(1.6) %	10.3 %

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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