



03 Sep.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,262	0.2 %	16.1 %
BSE SENSEX	57,853	0.9 %	16.0 %
CNX BANK	36,884	0.1 %	8.9 %
CNX MIDCAP	29,067	0.5 %	20.5 %
CNX SMALLCAP	10,452	0.5 %	26.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,444	0.4 %	15.8 %
S&P 500	4,537	0.3 %	20.8 %
FTSE 100	7,164	0.2 %	9.0 %
HANG SENG	26,090	0.2 %	(5.0) %
NIKKEI	28,544	0.3 %	4.7 %
SHANGHAI COMPOSITE	3,597	0.8 %	2.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.89	(0.5) %	(0.1) %
EUR/USD	1.18	0.2 %	(3.6) %
GBP/USD	1.38	0.0 %	0.8 %
USD/JPY	110.15	0.3 %	6.8 %
USD/AUD	1.36	(0.7) %	4.9 %
USD/SGD	1.35	(0.1) %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	2.0 %	47.0 %
Gold(INR/10g)	47,098	0.0 %	(7.7) %
Gold Comex(USD/oz)	1,817	(0.1) %	(6.8) %
SILVER(INR/1Kg)	63,681	1.1 %	(7.5) %
Aluminium(USD/MT)	2,695	1.0 %	33.8 %
Copper(USD/MT)	9,347	0.4 %	18.0 %

FIXED INCOME

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

Global Economy: The ISM said its manufacturing PMI inched up to 59.9 in August from 59.5 in July, with a reading above 50 indicating growth in the sector. The US construction spending rose by 0.3% to an annual rate of \$1.569 trillion in July after edging down marginally to revised rate of \$1.563 trillion in June. ADP said that US private sector employment rose by 374,000 jobs in August after rising by a downwardly revised 326,000 jobs in July. China manufacturing sector fell into contraction in August, the latest survey from Caixin revealed on Wednesday with a manufacturing PMI score of 49.2, down from 50.3 in July. It also drops beneath the boom-or-bust line of 50 that separates expansion from contraction. The euro area manufacturing sector registered another marked expansion during August, latest PMI data showed, although momentum waned once again as the headline index fell to a six-month low. The final reading of the IHS Markit Eurozone Manufacturing PMI for August of 61.4 was fractionally lower than the earlier 'flash' print of 61.5, and down from 62.8 in July. This marked a second successive month in which growth has slowed in the sector since June's survey record expansion. The headline IHS Markit/BME Germany Manufacturing PMI - a weighted aggregate of measures of new orders, output, employment, suppliers' delivery times and stock of purchases - signalled a loss of momentum in the goods-producing sector in August. At 62.6, down from 65.9 in July, the latest reading was the lowest since February (albeit still well above the 50.0 no-change threshold).

Global Equities: The US stocks saw another cautious session though the tech-heavy Nasdaq ended at a new record closing high.

Indian Economy: Growth of manufacturing production in India was curbed in August by the pandemic and rising input costs. A softer upturn in sales led companies to pause their hiring efforts, with business confidence dampened by concerns surrounding the damaging impact of COVID-19 on demand and firms' finances. Registering 52.3 in August, the seasonally adjusted IHS Markit India Manufacturing Purchasing Managers' Index pointed to an improvement in overall operating conditions for the second straight month. The headline figure was down from 55.3 in July, indicating a softer rate of growth that was subdued in the context of historical survey data.

Equity Markets: Key benchmark indices ended with modest losses on Wednesday, amid profit selling after recent steep gains. The Nifty managed to hold the 17,000 mark. Realty, consumer durables and banks stocks advanced while IT and metal shares corrected.

Corporate News: State Bank of India (SBI) has raised Rs 4,000 crore of the Basel compliant Additional Tier 1 (AT1) bonds on Wednesday at coupon rate of 7.72%. Kotak Mahindra Bank said that with the execution of a Share Purchase Agreement, the bank completed the transaction for sale of 20 crore equity shares (around 8.57% shareholding) of Airtel Payments Bank to Bharti Enterprises, on August 31, 2021 for Rs 294.8 crore. Vedanta said that its board has approved first interim dividend of Rs 18.50 per equity share for the financial year 2021-22, amounting to Rs 6,877 crore. The record date for the purpose of payment of dividend is set on 9 September 2021.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	87.6	87.6	1.5
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)	66,710	67,639	70,359
F&O(INR cr)	10,449,213	8,796,162	5,027,911

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.1	16.3	17.7
NSE VIX	14.2	14.2	16.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	36,831	0.7 %	8.8 %	Energy	20,466	0.5 %	10.5 %
IT	34,680	1.7 %	33.5 %	Pharma	14,459	1.0 %	16.8 %
Metals	5,653	0.7 %	35.0 %	Finance	18,182	0.8 %	14.3 %
Auto	10,022	(0.2) %	(0.0) %	PSU	2,344	(0.5) %	5.9 %
FMCG	40,296	1.6 %	15.5 %	Real Estate	413	1.2 %	23.1 %

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>
Shree Ceme	30,323	6.5 %	1.2 %	M & M	752	(2.3) %	(6.8) %
HDFC Life	759	5.6 %	9.8 %	Coal India	142	(1.8) %	7.2 %
Havells In	1,392	3.5 %	31.5 %	Avenue Sup	3,918	(1.3) %	34.5 %
Cipla	955	3.5 %	16.7 %	Bajaj Hold	4,285	(1.2) %	28.3 %
TCS	3,837	3.3 %	21.2 %	P & G Hygi	13,606	(1.1) %	8.3 %

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					

..... End of Report