



INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,527	(0.1) %	39.7 %
BSE SENSEX	38,991	(0.2) %	37.9 %
CNX BANK	23,531	(1.4) %	29.2 %
CNX MIDCAP	17,214	0.8 %	50.1 %
CNX SMALLCAP	5,746	0.7 %	62.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,293	(2.7) %	(0.9) %
S&P 500	3,455	(3.5) %	6.9 %
FTSE 100	5,851	(1.5) %	(23.1) %
HANG SENG	25,008	(0.5) %	(12.4) %
NIKKEI	23,466	0.9 %	1.1 %
SHANGHAI COMPOSITE	3,385	(0.6) %	9.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.05	(0.3) %	2.6 %
EUR/USD	1.19	(0.5) %	5.8 %
GBP/USD	1.33	0.0 %	1.2 %
USD/JPY	106.15	0.3 %	(2.3) %
USD/AUD	1.36	0.4 %	(4.4) %
USD/SGD	1.36	0.2 %	1.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(3.3) %	(32.4) %
Gold(INR/10g)	50,840	(0.5) %	30.4 %
Gold Comex(USD/oz)	1,940	(0.2) %	25.8 %
SILVER(INR/1Kg)	64,411	(1.6) %	39.9 %
Aluminium(USD/MT)	1,744	(2.0) %	(1.6) %
Copper(USD/MT)	6,613	(1.6) %	7.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.6	(0.0) %	(1.3) %

Global Economy: The ISM said its services PMI dipped to 56.9 in August from 58.1 in July, though a reading above 50 still indicates growth in the service sector. US trade deficit expanded to \$63.6 billion in July from a revised \$53.5 billion in June. The deficit in July was the widest since reaching \$67.0 billion in July of 2008. The US Labor Department said initial jobless claims declined to 881,000, a decrease of 130,000 from the previous week's revised level of 1.011 million. China's services sector grew strongly in August as businesses continued to recover from the coronavirus pandemic, survey data from IHS Markit showed Thursday. The Caixin services PMI fell marginally to 54.0 from 54.1 in July. A score above 50 still indicates expansion. The latest uptick extended the current sequence of growth to four months, signaling that the sector continued to recover from the marked drops in activity earlier in the year following the Covid-19 outbreak. New orders increased while sales were also elevated on strong domestic demand. The composite output index rose to 55.1 in August from 54.5 in July. Eurozone private sector recovery lost momentum in August amid fears of another wave of coronavirus infections, final data from IHS Markit showed. The composite output index fell to 51.9 in August from 54.9 in July. There was a divergence in performance between manufacturing and service sectors. Manufacturing output grew the most since April 2018, while the growth in services eased markedly from July. The services Purchasing Managers' Index dropped to 50.5 in August from 54.7 a month ago. Eurozone retail sales declined 1.3% on month in July on weak non-food products turnover and following a 5.3% rise in June, data from Eurostat showed Thursday. This was the first drop in three months. On a yearly basis, growth in retail sales slowed to 0.4% from 1.3% in June.

Global Equities: US stocks tumbled as rising volatility triggered a massive selloff after recent spurt. Tech stocks crumbled.

Indian Economy: India's service sector activity index rose to 41.8 in August from 34.2 in July, survey results from IHS Markit showed Thursday. The reading was the highest since March, before the escalation of the global COVID-19 pandemic. Any score below 50 indicates contraction in the sector. Output declined further in August with the rate of contraction solid overall and new business fell for the sixth month in a row with the rate of decline steepest since September 2014. Domestic employment decreased for the sixth straight month in August, albeit at a slower pace, the IHS Markit data showed. On the price front, cost burden increased for the second straight month in August and the rate of input price inflation was faster.

Equity Markets: Benchmark indices ended a lackluster trading session with small losses on Thursday. Gains were capped as rising COVID-19 cases spooked investors. Introduction of new margin requirement in the cash segment from 1st September and geo-political tensions between India-China also impacted sentiment.

Corporate News: Infosys said it will acquire product design and development firm, Kaleidoscope Innovation. Adani Gas will be in focus as ICRA upgraded company's long-term rating to AA- and re-affirmed short-term rating at A1+ with a stable outlook. Finance minister Nirmala Sitharaman asked banks and non-banking financial companies (NBFCs) to have their stressed loan resolution schemes rolled out by September 15.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	168.2	123.5	112.1
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)	52,273	56,809	55,747
F&O(INR cr)	3,586,271	2,531,946	1,633,830

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.6	28.8	30.7
NSE VIX	20.5	21.1	30.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,531	(1.4) %	29.2 %	Energy	15,735	(0.8) %	46.1 %
IT	18,349	1.5 %	52.3 %	Pharma	11,512	0.9 %	63.8 %
Metals	2,527	(0.6) %	62.7 %	Finance	11,371	(1.0) %	27.2 %
Auto	8,050	0.9 %	72.8 %	PSU	1,503	(0.8) %	17.1 %
FMCG	31,317	0.7 %	18.8 %	Real Estate	225	(0.2) %	30.9 %

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 Inf	219	11.5 %	40.9 %	Page Indus	19,163	(2.7) %	15.3 %
Grasim Ind	725	6.8 %	52.2 %	ICICI Bank	383	(2.5) %	23.0 %
United Bre	1,155	6.5 %	29.8 %	Bharti Air	538	(2.3) %	27.7 %
Titan Comp	1,185	5.7 %	26.6 %	Hindalco I	192	(2.1) %	109.5 %
UPL	522	4.2 %	70.7 %	Hindustan	225	(2.0) %	40.1 %

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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