



07 Sep.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 11,334 | (1.7) % | 37.3 % |
| BSE SENSEX | 38,357 | (1.6) % | 35.7 % |
| CNX BANK | 23,012 | (2.2) % | 26.4 % |
| CNX MIDCAP | 16,926 | (1.7) % | 47.6 % |
| CNX SMALLCAP | 5,679 | (1.2) % | 60.4 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 28,133 | (0.6) % | (1.4) % |
| S&P 500 | 3,427 | (0.8) % | 6.1 % |
| FTSE 100 | 5,799 | (0.9) % | (23.7) % |
| HANG SENG | 24,695 | (1.3) % | (13.5) % |
| NIKKEI | 23,205 | (1.1) % | 0.0 % |
| SHANGHAI COMPOSITE | 3,355 | (0.9) % | 8.8 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 73.25 | 0.3 % | 2.9 % |
| EUR/USD | 1.18 | (0.3) % | 5.5 % |
| GBP/USD | 1.33 | (0.5) % | 0.8 % |
| USD/JPY | 106.24 | 0.1 % | (2.2) % |
| USD/AUD | 1.37 | 0.6 % | (3.9) % |
| USD/SGD | 1.36 | 0.2 % | 1.4 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 40 | (3.9) % | (35.0) % |
| Gold(INR/10g) | 50,940 | 0.2 % | 30.6 % |
| Gold Comex(USD/oz) | 1,949 | 0.5 % | 26.3 % |
| SILVER(INR/1Kg) | 64,098 | (0.5) % | 39.2 % |
| Aluminium(USD/MT) | 1,753 | 0.5 % | (1.1) % |
| Copper(USD/MT) | 6,678 | 1.0 % | 8.3 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 0.7 | 0.1 % | (1.2) % |

Global Economy: The US Labor Department said its keenly eyed non-farm payroll employment surged up by 1.371 million jobs in August after spiking by a downwardly revised 1.734 million jobs in July and soaring by 4.781 million jobs in June. The strong job growth in August was partly due to the hiring of 238,000 temporary 2020 Census workers. US Federal Reserve Chairman Jerome Powell said the pace of jobs growth is rising faster than many people expected, but it may take years before the economy has fully recovered. Powell noted that US economy likely will require more government spending and low interest rates for years. Germany's factory orders growth moderated in July, data from Destatis revealed Friday. Factory orders rose 2.8% on a monthly basis, following 28.8% rise in June. Domestic orders fell 10.2% while foreign orders rose 14.4% in July on the previous month. On a yearly basis, overall factory orders declined 7.3% in July, following a 10.6% fall in June. Germany's construction Purchasing Managers' Index rose to 48.0 in August from 47.1 in July, survey data from IHS Markit showed Friday. The score was the highest in six months in August. But a score below 50 indicates contraction. UK construction sector growth moderated in August from a near five-year high largely due to the lack of new work to replace completed contracts, survey results from IHS Markit showed Friday. The IHS Markit/Chartered Institute of Procurement & Supply construction Purchasing Managers' Index fell unexpectedly to 54.6 in August from 58.1 in July. Nonetheless, a score above 50 indicates expansion. UK new car sales dropped in August after a double-digit growth in the previous month, reports said on Friday, citing data from the Society of Motor Manufacturers and Traders, or SMMT. New car registrations dropped 5% year-on-year in August after 11.3% surge in July, which was the first expansion this year.

Global Equities: US stocks tumbled on Friday. A good pullback was seen on hopes of continued monetary support though the DOW ended near two week low.

Indian Economy: The Reserve Bank of India (RBI) on Friday said it has revised priority sector lending (PSL) guidelines to include entrepreneurship and renewable resources, in line with emerging national priorities. Revised PSL guidelines will enable better credit penetration to credit deficient areas; increase the lending to small and marginal farmers and weaker sections; boost credit to renewable energy, and health infrastructure. RBI said loans up to Rs 50 crore for start-ups would be treated as PSL exposure for banks. The loan limit for renewable energy has been doubled to Rs 30 crore.

Equity Markets: Key equity indices ended with steep losses on Friday as rising COVID-19 cases and ongoing geo-political tensions between India-China weighed on the sentiment. All the sectoral indices on the NSE ended in the red. The barometer index, the S&P BSE Sensex, fell 633.76 points or 1.63% at 38,357.18. The Nifty 50 index slipped 193.60 points or 1.68% at 11,333.85.

Corporate News: IT counters could be under some stress as the Indian Rupee rose in last session. INR closed at 73.14, rising 33 paise on the day after almost testing 73 mark. REC said its subsidiary received a 10 MW solar power project order in Rajasthan. Endurance Technologies will be in focus as based on an eligibility certificate from the Maharashtra government, the company is entitled to a cumulative incentive of Rs 466.39 crore under the package scheme of incentives. Of the eligible incentive, the company already accounted for Rs 128.93 crore until the June 30.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (16.2) | 76.9 | 110.9 |
| 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) | 1,327,310 | 2,230,787 | 1,630,966 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 30.8 | 29.3 | 30.7 |
| NSE VIX | 22.2 | 21.4 | 30.6 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 23,012 | (2.2) % | 26.4 % | Energy | 15,435 | (1.9) % | 43.3 % |
| IT | 18,074 | (1.5) % | 50.0 % | Pharma | 11,281 | (2.0) % | 60.6 % |
| Metals | 2,451 | (3.0) % | 57.8 % | Finance | 11,158 | (1.9) % | 24.8 % |
| Auto | 7,997 | (0.7) % | 71.7 % | PSU | 1,462 | (2.7) % | 14.0 % |
| FMCG | 30,829 | (1.6) % | 17.0 % | Real Estate | 220 | (2.3) % | 27.9 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Maruti Suz | 7,190 | 1.7 % | 69.3 % | Piramal En | 1,292 | (4.2) % | 38.0 % |
| Oracle Fin | 2,981 | 1.5 % | 55.2 % | Axis Bank | 455 | (4.2) % | 26.9 % |
| Abbott Ind | 16,542 | 0.6 % | 5.9 % | ICICI Pru | 421 | (4.0) % | 22.9 % |
| Bandhan Ba | 314 | 0.5 % | 61.3 % | Adani Tran | 265 | (3.8) % | 40.1 % |
| ICICI Lomb | 1,290 | 0.2 % | 16.7 % | Tata Steel | 421 | (3.8) % | 58.2 % |

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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