



08 Sep.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,355	0.0 %	37.6 %
BSE SENSEX	38,417	0.2 %	36.3 %
CNX BANK	22,945	0.0 %	26.0 %
CNX MIDCAP	16,780	0.0 %	46.3 %
CNX SMALLCAP	5,685	0.0 %	60.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,133	(0.6) %	(1.4) %
S&P 500	3,427	(0.8) %	6.1 %
FTSE 100	5,937	2.4 %	(21.9) %
HANG SENG	24,590	(0.4) %	(13.9) %
NIKKEI	23,090	(0.5) %	(0.5) %
SHANGHAI COMPOSITE	3,293	(1.9) %	6.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.04	(0.0) %	2.6 %
EUR/USD	1.18	(0.2) %	5.6 %
GBP/USD	1.33	(0.6) %	0.7 %
USD/JPY	106.29	0.1 %	(2.2) %
USD/AUD	1.37	0.8 %	(3.7) %
USD/SGD	1.37	0.2 %	1.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	(3.9) %	(35.0) %
Gold(INR/10g)	51,008	0.1 %	30.8 %
Gold Comex(USD/oz)	1,931	(0.9) %	25.2 %
SILVER(INR/1Kg)	65,094	1.6 %	41.3 %
Aluminium(USD/MT)	1,763	0.6 %	(0.5) %
Copper(USD/MT)	6,791	1.7 %	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	0.0 %	(1.2) %

**Global Economy:** China's exports rose in August mainly on continued base effects, while imports dropped from last year, data from the General Administration of Customs showed Monday. Chinese exports jumped 9.5% on a yearly basis in August while imports were down 2.1%, extending the slide of 1.4% in July. As a result, the trade surplus totaled \$58.9 billion compared to July's \$62.3 billion. Eurozone investor confidence rose to the highest since February as the economy continued to recover from the coronavirus induced slump, survey data from Sentix showed Monday. The investor confidence index rose to -8.0 in September from -13.4 in August. This was the fifth successive increase and helped the index reach its highest level since February. German industrial production grew 1.2% on month, data from Destatis revealed Monday. On a yearly basis, industrial output fell 10%, following June's 11.4% decrease. Excluding energy and construction, industrial production was up 2.8% in July. UK house prices increased at the fastest pace since late 2016 driven by the pent-up demand and stamp duty reduction, data from the Lloyds Bank subsidiary Halifax and IHS Markit showed. House prices increased 5.2% on a yearly basis in three months to August, which was the strongest since late 2016. Japan's leading index, which measures the future economic activity, rose to 86.9 in July from 83.8 in June, preliminary data from the Cabinet Office showed. The latest reading was the highest since February, when it was 91.2. The coincident index increased to 76.2 in July from 74.4 in the previous month. This was the highest since April.

**Global Equities:** European markets surged with the indices in UK and Germany spiking 2%. US markets were shut for a public holiday.

**Indian Economy:** A RBI committee has selected 26 sectors which will require restructuring based on its analyses of financial parameters hit due to the economic crash caused by the COVID-19 pandemic. In its report the five member committee said power, construction, iron and steel, roads, real estate, wholesale trading, textiles, consumer durables, aviation, logistics, hotels, restaurants and tourism, mining are among the sectors that will need restructuring. The committee has recommended sector specific parameters which it said may be considered as guidance for preparation of resolution plan for a borrower in the specified sector.

**Equity Markets:** Key domestic indices ended with minor gains after volatile session on Monday. The barometer index, the S&P BSE Sensex, rose 60.05 points or 0.16% at 38,417.23. The Nifty 50 index added 21.20 points or 0.19% at 11,355.05.

**Corporate News:** Top carmaker Maruti Suzuki said its total production in August increased by 11% to 1,23,769 units. PNC Infratech Limited on Monday said its joint venture with SPML Infra has won an Rs 290 crore water supply project in Uttar Pradesh. Dr Reddy's Laboratories will be in focus as it has launched Fulvestrant injection in the US market.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(382.8)	(38.0)	106.2
MF(INR cr)	(599.4)	(721.9)	(209.6)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	49,120	54,887	55,684
F&O(INR cr)	1,327,891	2,050,208	1,628,159

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.8	29.6	30.7
NSE VIX	22.0	21.5	30.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,945	(0.3) %	26.0 %	Energy	15,356	(0.5) %	42.6 %
IT	18,177	0.6 %	50.9 %	Pharma	11,270	(0.1) %	60.4 %
Metals	2,450	(0.1) %	57.7 %	Finance	11,144	(0.1) %	24.6 %
Auto	7,958	(0.5) %	70.9 %	PSU	1,461	(0.1) %	13.8 %
FMCG	31,004	0.6 %	17.6 %	Real Estate	218	(0.9) %	26.7 %

### 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	231	7.5 %	48.9 %	Bajaj Hold	2,485	(4.1) %	41.6 %
HDFC Life	592	3.0 %	37.7 %	M & M	610	(3.4) %	123.7 %
Adani Tran	272	2.4 %	43.6 %	UPL	494	(2.8) %	61.7 %
ACC	1,340	2.4 %	39.1 %	Bajaj Fina	3,505	(2.5) %	57.9 %
Dr Reddy's	4,420	2.3 %	42.8 %	Muthoot Fi	1,095	(2.5) %	81.1 %

### 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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