



08 Sep.2023

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	19,727	0.0 %	13.4 %
BSE SENSEX	66,266	0.6 %	12.1 %
CNX BANK	44,878	0.0 %	10.0 %
CNX MIDCAP	40,594	0.0 %	34.6 %
CNX SMALLCAP	12,734	0.0 %	40.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,501	0.2 %	4.1 %
S&P 500	4,451	(0.3) %	16.4 %
FTSE 100	7,442	0.2 %	(1.5) %
HANG SENG	18,202	(1.3) %	(9.6) %
NIKKEI	32,991	(0.8) %	28.3 %
SHANGHAI COMPOSITE	3,122	(1.1) %	0.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.16	0.5 %	0.6 %
EUR/USD	1.07	(0.6) %	0.3 %
GBP/USD	1.25	(0.7) %	3.7 %
USD/JPY	147.52	0.8 %	12.5 %
USD/AUD	1.57	1.3 %	6.8 %
USD/SGD	1.36	0.6 %	1.5 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	87	1.6 %	12.9 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,926	(0.3) %	4.7 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,158	1.0 %	(7.7) %
Copper(USD/MT)	8,395	(0.4) %	0.1 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	4.3	0.0 %	0.4 %

**Global Economy:** First-time claims for U.S. unemployment benefits unexpectedly saw a continued decline in the week ended September 2nd, according to a report released by the Labor Department on Thursday. The report said initial jobless claims fell to 216,000, a decrease of 13,000 from the previous week's revised level of 229,000. Continuing claims, a reading on the number of people receiving ongoing unemployment, also slid by 40,000 to 1.679 million in the week ended August 26th. A separate report released by the Labor Department on Thursday showed labor productivity in the U.S. jumped to 3.5 percent from 3.7 percent. Meanwhile, the report said the jump in unit labor costs in the second quarter was upwardly revised to 2.2 percent from 1.6 percent. The euro area economy logged only a marginal growth in the second quarter reigniting fears of a recession after the net trade acted as a drag on growth. Revised estimate published by the Eurostat showed that Eurozone GDP grew by a marginal 0.1 percent in the June quarter. China's exports slid 8.8 percent on a yearly basis in August but slower than the 14.5 percent decline in July, the General Administration of Customs reported. At the same time, the annual fall in imports slowed to 7.3 percent from 12.4 percent a month ago. Consequently, the trade balance showed a surplus of \$68.4 billion. Japan's gross domestic product expanded a seasonally adjusted 1.2 percent on quarter in the second quarter of 2023, the Cabinet Office reported. On an annualized basis, GDP advanced 4.8 percent.

**Global Indices:** The Nasdaq slumped 123.64 points or 0.9 percent to 13,748.83 and the S&P 500 fell 14.34 points or 0.3 percent to 4,451.14. Meanwhile, the narrower Dow climbed into positive territory and ended the day up 57.54 points or 0.2 percent at 34,500.73.

**Indian Economy:** The Reserve Bank of India (RBI) has reported that currency in circulation contracted by 0.10% on the week to stand at Rs 33.05 lakh crore as on September 3, 2023. The central bank stated further that the overall reserve money edged up 1.30% on the week to Rs 45.13 lakh crore. Currency in circulation rose 3.9% on a year ago basis compared to 8.3% surge at the same time last year. In the current fiscal, the currency in circulation has contracted by 2.2% so far while the reserve money has edged up by 0.7%.

**Equity Market:** The barometer index, the S&P BSE Sensex advanced 385.04 points or 0.58% to 66,265.56. The Nifty 50 index added 116 points or 0.59% to 19,727.05. In five trading sessions, the Sensex rose 2.21% while the Nifty 50 climbed 2.46%.

**Corporate News:** LTIMindtree has launched two industry solutions, AdSpark and Smart Service Operations, to accelerate the time-to-market for businesses on the Salesforce platform. Ashok Leyland unveiled the Electric Light Commercial Vehicles from Switch Mobility - the IeV Series. The IeV Series is India's first electric commercial vehicles in its category and aims to provide efficient and eco-friendly solutions for last mile transportation needs.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(340.9)	(142.8)	180.4
MF(INR cr)	441.1	905.5	265.7

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	86,909	77,129	69,589
F&O(INR cr)	41,441,733	31,098,677	27,483,453

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.5	13.7	15.7
NSE VIX	10.9	10.9	11.7

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	44,878	1.1 %	10.0 %	Energy	27,063	0.9 %	18.7 %
IT	32,448	0.4 %	13.3 %	Pharma	15,306	(0.3) %	26.8 %
Metals	6,981	(0.0) %	27.4 %	Finance	19,961	1.0 %	9.9 %
Auto	15,996	0.5 %	28.7 %	PSU	4,691	1.2 %	24.9 %
FMCG	51,853	(0.4) %	13.4 %	Real Estate	579	1.5 %	48.2 %

## 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>
Coal India	274	7.1 %	24.5 %	Tata Consu	859	(2.3) %	19.8 %
Larsen & T	2,846	4.2 %	31.2 %	Adani Ener	839	(1.9) %	(11.0) %
Page Indus	42,441	4.0 %	12.3 %	Torrent Ph	1,892	(1.6) %	22.4 %
HDFC AMC	2,523	2.7 %	45.8 %	A B B	4,449	(1.1) %	31.9 %
P & G Hygi	16,808	2.5 %	19.8 %	Info Edg.(	4,450	(0.9) %	20.4 %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Employment Change	08-09-2023	18:00	CAD	-	-
German Final CPI m/m	08-09-2023	11:30	EUR	-	0.003
French Industrial Production m/m	08-09-2023	12:15	EUR	-	(0.009)
Average Cash Earnings y/y	08-09-2023	05:00	JPY	-	0.023
Bank Lending y/y	08-09-2023	05:20	JPY	-	0.029
Economy Watchers Sentiment	08-09-2023	10:30	JPY	-	54.4
Final Wholesale Inventories m/m	08-09-2023	19:30	USD	-	(0.001)

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