



10 Sep.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,278	(0.3) %	36.6 %
BSE SENSEX	38,194	(0.4) %	35.1 %
CNX BANK	22,267	(2.1) %	22.3 %
CNX MIDCAP	16,450	(0.5) %	43.4 %
CNX SMALLCAP	5,546	(1.5) %	56.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,940	1.6 %	(2.1) %
S&P 500	3,399	2.0 %	5.2 %
FTSE 100	6,013	1.4 %	(20.9) %
HANG SENG	24,469	(0.6) %	(14.3) %
NIKKEI	23,033	(1.0) %	(0.7) %
SHANGHAI COMPOSITE	3,255	(1.9) %	5.5 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.59	0.8 %	3.4 %
EUR/USD	1.18	(0.4) %	5.2 %
GBP/USD	1.31	(1.6) %	(0.9) %
USD/JPY	106.14	(0.1) %	(2.3) %
USD/AUD	1.38	0.4 %	(3.3) %
USD/SGD	1.37	0.3 %	1.7 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	(7.6) %	(39.9) %
Gold(INR/10g)	51,066	0.2 %	31.0 %
Gold Comex(USD/oz)	1,932	0.1 %	25.2 %
SILVER(INR/1Kg)	64,951	0.9 %	41.0 %
Aluminium(USD/MT)	1,744	(1.1) %	(1.6) %
Copper(USD/MT)	6,768	(0.3) %	9.8 %

## 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:** Unemployment rate in world's biggest economies eased in July but remains higher than levels before the Covid-19 pandemic, according to the Organisation for Economic Co-operation and Development (OECD). The unemployment rate in the group's 37 member countries fell to 7.7% in July from 8% in June, the Paris-based organisation said in a report on Wednesday. Both, however, were higher by 2.5 percentage points from February. China consumer prices were up 2.4% on year in August, the National Bureau of Statistics said on Wednesday, slowing from 2.7% in July. On a monthly basis, consumer prices were up 0.4 percent, down from the 0.6% increase in the previous month. The stats bureau also reported that producer prices were down 2% on year. Japan's machine tool orders decreased 23.3% year-on-year following a 31.1% slump in July, preliminary data from the Japan Machine Tool Builders' Association showed. The pace of decline slowed for a third straight month after a 52.8% crash in May. In August, domestic demand decreased 38.6% and foreign orders shrunk 12%. On a month-on-month basis, machine tool orders fell 2.7% in August. The value of owner-occupied home loans in Australia rose a seasonally adjusted 10.7% on month in July following a 5.5% rise in June, the Australian Bureau of Statistics said. The latest figure stood A\$14.33 billion. Investment lending was up 3.5% in June to A\$4.58 billion, slowing from 8.1% in the previous month. On a yearly basis, owner-occupied home loans soared 18.5%.

**Global Equities:** Solid gains emerged in the US stocks after latest string of losses. Lack of economic cues did not matter as tech stocks rallied sharply.

**Indian Economy:** Federation of Automobile Dealers Associations (FADA), said that total domestic vehicle registrations fell 26.81% to 11.88 lakh units in August 2020 as against 16.23 lakh units in August 2019. Sequentially, total vehicle registration rose 3.97% in August 2020 compared with 11.42 lakh units in July 2019. Commercial vehicle (CV) registrations tanked 57.39% on Y-o-Y basis. Passenger vehicle registration declined 7.12% to 1.78 lakh units on year-on-year (YoY) basis. Two-wheeler registration stood at 8.98 lakh units in August 2020 as against 12.60 lakh units in August 2019, registering a decline of 28.71%. Three-wheeler registration witnessed a 69.51% drop to 16,857 units in August 2020 as against 55,293 units in August 2019. Domestic tractor sales jumped 27.80% to 67,406 units in August 2020 over 52,744 units in August 2019. FADA noted that while OEM's are dispatching vehicles to Dealers with a purpose of stocking-up inventory for the upcoming festival season, retail sales are still at 70-75% levels despite the low base of last year.

**Equity Markets:** Key equity benchmarks ended with modest losses on Wednesday. The broader market was trading lower. The S&P BSE Mid-Cap index fell 0.28% while the S&P BSE Small-Cap index was declined 0.94%. Investors turned cautious after External Affairs Minister S. Jaishankar was quoted by the media as saying that the current India-China border situation was "very serious". In a fresh sign of escalation, India and China reportedly accused each other of firing into the air on the border of western Himalayas.

**Corporate News:** Public Sector Banks performance on EASE Index improved by 37% over March 2019-20. The EASE Index ranks PSBs based on their performance in various themes. The overall EASE Index improved 37% over March 2019-20 from 49.2 to 67.4 out of 100, the statement said. The sharpest improvement was made under the responsible banking theme. Power Grid Corporation of India Ltd (PGCIL) on Wednesday announced the commissioning of the first leg of the 6,000 MW Raigarh-Pugalur high voltage direct current transmission project. Adani Transmission: Promoters released a pledge on 4,49,56,300 equity shares and 94,60,000 shares respectively.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(21.4)	(25.1)	104.3
MF(INR cr)	(639.5)	(731.9)	(210.0)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	56,764	54,752	55,662
F&O(INR cr)	2,097,382	1,982,587	1,631,530

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.5	29.9	30.7
NSE VIX	22.2	21.8	30.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,267	(2.1) %	22.3 %	Energy	15,366	0.2 %	42.6 %
IT	18,262	(0.7) %	51.6 %	Pharma	11,304	1.9 %	60.9 %
Metals	2,397	0.9 %	54.3 %	Finance	10,888	(1.8) %	21.8 %
Auto	7,903	0.2 %	69.7 %	PSU	1,397	(2.9) %	8.8 %
FMCG	30,634	(0.6) %	16.2 %	Real Estate	211	(1.5) %	22.6 %

### 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>
Zee Entert	222	3.6 %	83.3 %	St Bk of I	195	(4.5) %	4.4 %
Tata Steel	417	3.0 %	56.7 %	GAIL (Indi	91	(3.7) %	20.2 %
Biocon	428	2.9 %	53.7 %	General In	134	(3.7) %	27.0 %
Cipla	728	2.7 %	75.8 %	ICICI Lomb	1,218	(3.6) %	10.1 %
Reliance I	2,161	2.6 %	101.9 %	Shriram Tr	639	(3.6) %	5.1 %

### 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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