



11 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,449	1.5 %	38.7 %
BSE SENSEX	38,840	1.7 %	37.4 %
CNX BANK	22,466	0.9 %	23.4 %
CNX MIDCAP	16,653	1.2 %	45.2 %
CNX SMALLCAP	5,635	1.6 %	59.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,535	(1.5) %	(3.5) %
S&P 500	3,339	(1.8) %	3.4 %
FTSE 100	6,003	(0.2) %	(21.1) %
HANG SENG	24,314	(0.6) %	(14.8) %
NIKKEI	23,235	0.9 %	0.1 %
SHANGHAI COMPOSITE	3,235	(0.6) %	4.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.42	0.2 %	3.1 %
EUR/USD	1.18	(0.3) %	5.1 %
GBP/USD	1.30	(1.7) %	(1.6) %
USD/JPY	106.09	(0.2) %	(2.4) %
USD/AUD	1.38	0.4 %	(3.3) %
USD/SGD	1.37	0.2 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	(2.0) %	(39.0) %
Gold(INR/10g)	51,416	0.7 %	31.9 %
Gold Comex(USD/oz)	1,948	(0.1) %	26.3 %
SILVER(INR/1Kg)	65,871	1.4 %	43.0 %
Aluminium(USD/MT)	1,744	0.2 %	(1.6) %
Copper(USD/MT)	6,711	0.0 %	8.8 %

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: The US Labor Department said its producer price index for final demand rose by 0.3% in August after surging by 0.6% in July. First-time claims for U.S. unemployment benefits came in unchanged in the week ended September 5th, the Labor Department revealed in a report on Thursday. The report said initial jobless claims came in at 884,000, unchanged from the previous week's revised level. European Central Bank (ECB) decided on Thursday to keep its monetary policy unchanged. The bank's governing council decided to keep its key rate unchanged at -0.5%, and to keep buying assets under its Euro 1,350 billion pandemic-specific program without increasing the amount of its planned purchases. The ECB noted in a release after its ruling body's meeting that rates would remain at their current level or lower until it has seen the inflation outlook robustly converge to a level sufficiently close to its target. UK house prices increased at the fastest pace since 2016 as almost all regions logged price increases, survey data from the Royal Institution of Chartered Surveyors, or RICS, showed Thursday. The house price balance rose to +44% in August, the highest reading since 2016, from +13% registered in July. The agency noted that virtually all parts of the UK are now seeing prices increases. A net balance of 63 percent of contributors reported an increase in buyer interest during August. About 46% of participants said new instructions being listed onto the sales market continued to rise.

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: The IMF has said that there is a need for another stimulus in India, especially expenditures on health, food and income support for vulnerable households, and support for businesses in view of the COVID-19 pandemic. The Reserve Bank Of India (RBI) reported that currency in circulation rose 0.30% on the week to stand at Rs 26.87 lakh crore as on September 4th 2020. The central bank stated further that the overall reserve money also expanded by 0.7% on the week to Rs 32.15 lakh crore. Currency in circulation rose around 22.60% on a year ago basis compared to 13% growth at the same time last year. In the current fiscal, the currency in circulation has gone up by 9.8% so far while the reserve money has expanded by 6.1%.

Equity Markets: Key equity benchmark ended with robust gains near the day's high on Thursday. In the broader market today, the S&P BSE Mid-Cap index gained 0.92% while the S&P BSE Small-Cap index rose 1.27%. Both these indices lagged the Sensex. The market breadth was strong. On the BSE, 1815 shares rose and 898 shares fell. A total of 163 shares were unchanged.

Corporate News: India's fuel demand in August saw its biggest decline since April as local lockdowns put brakes on economic activity and transportation. Petroleum product sales fell to 14.39 million tonnes in August, down 7.5% over the previous month and about 16 per cent from a year earlier, data from the oil ministry's Petroleum Planning and Analysis Cell (PPAC) showed. National Fertilizers reported total fertilizer sale of 23.81 lakh MT and production of 16.11 lakh MT urea in April-August, 2020. Oil marketing companies could be in focus as WTI futures tumbled more than 2% to test three month low near \$37 per barrel.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(130.3)	(40.1)	102.1
MF(INR cr)	(63.5)	(423.1)	(204.6)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	62,838	55,907	55,728
F&O(INR cr)	4,581,698	2,307,476	1,658,108

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.7	29.7	30.6
NSE VIX	21.3	21.7	30.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,466	0.9 %	23.4 %	Energy	15,978	4.0 %	48.3 %
IT	18,396	0.7 %	52.7 %	Pharma	11,303	(0.0) %	60.9 %
Metals	2,370	(1.1) %	52.5 %	Finance	10,968	0.7 %	22.7 %
Auto	7,945	0.5 %	70.6 %	PSU	1,431	2.5 %	11.5 %
FMCG	30,779	0.5 %	16.8 %	Real Estate	212	0.6 %	23.3 %

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>
Reliance I	2,314	7.1 %	116.2 %	Bharti Inf	200	(5.0) %	28.9 %
B P C L	430	6.0 %	42.0 %	Hindalco I	177	(3.4) %	92.7 %
Adani Tran	272	4.0 %	43.7 %	NMDC	90	(2.4) %	13.9 %
Asian Pain	2,057	3.9 %	28.3 %	Tata Steel	408	(2.3) %	53.2 %
H P C L	201	3.8 %	9.3 %	Container	368	(2.0) %	15.8 %

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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