



11 Sep.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	19,820	0.5 %	13.9 %
BSE SENSEX	66,599	0.5 %	12.7 %
CNX BANK	45,156	0.6 %	10.6 %
CNX MIDCAP	40,978	0.9 %	35.8 %
CNX SMALLCAP	12,812	0.6 %	41.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,577	0.2 %	4.3 %
S&P 500	4,457	0.1 %	16.6 %
FTSE 100	7,478	0.5 %	(1.0) %
HANG SENG	18,202	(1.3) %	(9.6) %
NIKKEI	32,607	(1.2) %	26.8 %
SHANGHAI COMPOSITE	3,117	(0.2) %	0.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.18	0.0 %	0.6 %
EUR/USD	1.07	(0.2) %	0.1 %
GBP/USD	1.25	(0.5) %	3.2 %
USD/JPY	147.40	(0.1) %	12.4 %
USD/AUD	1.57	0.1 %	6.9 %
USD/SGD	1.37	0.2 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	88	0.7 %	13.8 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,925	(0.4) %	4.6 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,133	(0.1) %	(8.8) %
Copper(USD/MT)	8,225	(0.2) %	(2.0) %

FIXED INCOME

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

Global Economy: A report released by the Commerce Department on Friday showed a modest decrease by U.S. wholesale inventories in the month of July. Wholesale inventories dipped by 0.2 percent in July after falling by a revised 0.7 percent in June. Meanwhile, wholesale sales advanced by 0.8 percent in July after sliding by 0.8 percent in June. With inventories falling and sales climbing, the inventories/sales ratio for merchant wholesalers dropped to 1.39 in July from 1.41 in June. In July, US consumer credit increased at a seasonally adjusted annual rate of 2.5 percent, as per US Fed report. China's consumer price index (CPI), a main gauge of inflation, edged up 0.1 percent in August compared with one year earlier, the National Bureau of Statistics (NBS) reported. On a monthly basis, the CPI rose 0.3 percent from the previous month. Meanwhile, producer price index (PPI) went down 3 percent year on year in August. On a monthly basis, the August PPI edged up 0.2 percent. Germany's inflation slowed to 6.1 percent in August from 6.2 percent in July, final data from Destatis revealed. Core inflation held steady at 5.5 percent in August. The M2 money stock in Japan was up 2.5 percent on year in August, the Bank of Japan reported - coming in at 1,238.6 trillion yen. The M3 money stock was up an annual 1.9 percent for the second straight month at 1,594.7 trillion yen, while the L money stock gained 2.2 percent on year to 2,121.1 trillion yen.

Global Indices: Despite the uptick on the week, the major averages closed notably lower for the week. The Nasdaq tumbled by 1.9 percent, the S&P 500 slumped by 1.3 percent and the Dow slid by 0.8 percent.

Indian Economy: Global energy sector has witnessed a historic moment with announcement of the Global Biofuels Alliance (GBA) by Prime Minister Shri Narendra Modi on the sidelines of the G20 Summit. GBA is an India-led Initiative to develop an alliance of Governments, International organizations and Industry to facilitate adoption of biofuels. Bringing together the biggest consumers and producers of biofuels to drive biofuels development and deployment, the initiative aims to position biofuels as a key to energy transition and contribute to jobs and economic growth.

Equity Market: The barometer index, the S&P BSE Sensex advanced 333.35 points or 0.50% to 66,598.91. The Nifty 50 index added 92.90 points or 0.47% to 19,819.95.

Corporate News: Reliance Industries (RIL)'s Jio Platforms announced its partnership with NVIDIA to develop a cloud-based AI compute infrastructure. This infrastructure aims to bolster India's position in the field of artificial intelligence. Adani Global Pte. Ltd., Singapore, a step down wholly owned subsidiary of the Company (AGPTE) has signed Joint Venture Agreement with Kowa Holdings Asia Pte. Ltd., Singapore (KOWA) on 8th September 2023. The agreement is for the sales and marketing of green ammonia, green hydrogen and its derivatives produced and supplied by Adani Group, in the agreed Territory.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(86.5)	(131.5)	177.9
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)	98,174	80,637	69,851
F&O(INR cr)	20,218,907	29,285,382	27,416,806

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.8	13.8	15.7
NSE VIX	10.8	10.9	11.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	45,156	0.6 %	10.6 %	Energy	27,438	1.4 %	20.3 %
IT	32,416	(0.1) %	13.2 %	Pharma	15,251	(0.4) %	26.4 %
Metals	6,978	(0.0) %	27.4 %	Finance	20,138	0.9 %	10.9 %
Auto	16,103	0.7 %	29.6 %	PSU	4,706	0.3 %	25.3 %
FMCG	51,778	(0.1) %	13.2 %	Real Estate	591	2.1 %	51.3 %

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>
Havells In	1,450	5.8 %	22.0 %	Page Indus	41,858	(1.4) %	10.8 %
Cholaman.I	1,176	4.1 %	51.0 %	Varun Beve	910	(1.2) %	28.7 %
Coal India	282	3.0 %	28.1 %	Torrent Ph	1,873	(1.0) %	21.2 %
NTPC	240	2.6 %	35.1 %	Eicher Mot	3,371	(0.9) %	12.2 %
I R C T C	726	2.6 %	27.2 %	SRF	2,440	(0.9) %	3.3 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Italian Industrial Production m/m	11-09-2023	13:30	EUR	-	0.005
M2 Money Stock y/y	11-09-2023	05:20	JPY	-	0.024
Prelim Machine Tool Orders y/y	11-09-2023	11:30	JPY	-	(0.197)

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