



12 Sep.2023

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D  | % YTD  |
|----------------|--------|-------|--------|
| CNX NIFTY      | 19,996 | 0.9 % | 14.9 % |
| BSE SENSEX     | 67,127 | 0.8 % | 13.6 % |
| CNX BANK       | 45,571 | 0.9 % | 11.7 % |
| CNX MIDCAP     | 41,444 | 1.1 % | 37.4 % |
| CNX SMALLCAP   | 12,982 | 1.3 % | 43.3 % |

| GLOBAL INDICES     | LATEST | % 1D    | % YTD    |
|--------------------|--------|---------|----------|
| DOW JONES          | 34,664 | 0.3 %   | 4.6 %    |
| S&P 500            | 4,487  | 0.7 %   | 17.3 %   |
| FTSE 100           | 7,497  | 0.3 %   | (0.8) %  |
| HANG SENG          | 18,096 | (0.6) % | (10.2) % |
| NIKKEI             | 32,468 | (0.4) % | 26.3 %   |
| SHANGHAI COMPOSITE | 3,143  | 0.8 %   | 0.8 %    |

**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:** The euro area economy is set to log a weaker-than-estimated growth this year and next as rising consumer prices continue to weigh on domestic demand and monetary policy tightening works its way through the economy. In the summer interim forecast, released Monday, the European Commission said the 20-nation currency bloc will grow 0.8 percent in 2023, which was revised down from 1.1 percent projected in the Spring Forecast. Moreover, weaker growth momentum is set to extend to 2024 due to the impact of monetary policy tightening. The German economy is forecast to contract 0.4 percent this year, which was revised down from the 0.2 percent growth projected in the Spring Forecast as weaker consumption and a fall in construction investment are set to negatively impact growth, the EU said. For 2024, Germany's real GDP is forecast to rebound 1.1 percent driven by a recovery in consumption. In the Spring forecast, growth was estimated at 1.4 percent. Japan's machine tool orders declined for the eighth straight month in August largely due to weak domestic demand, preliminary data from the Japan Machine Tool Builders Association, or JMTBA, showed Monday. Machine tool orders plummeted 17.6 percent year-on-year in August, though slower than the 19.7 percent fall in the previous month. On a monthly basis, machine tool orders rose 0.4 percent in August, compared with a 6.4 percent decline in the prior month.

**Global Indices:** The Nasdaq jumped 156.37 points or 1.1 percent to 13,917.89, the S&P 500 climbed 29.97 points or 0.7 percent to 4,487.46 and the Dow rose 87.13 points or 0.3 percent to 34,663.72.

**Indian Economy:** As a part of Government of India initiative for market intervention to control the retail price of rice, wheat and atta, weekly e auctions of both wheat and rice are organized. The 11th e-auction of 2023-24 was held on 06.09.2023. A quantity of 2.0 LMT wheat from 500 depots and 4.89 LMT rice from 337 depots were offered from across the country. In the e-auction, 1.66 LMT wheat and 0.17 LMT rice was sold.

**Equity Market:** The barometer index, the S&P BSE Sensex jumped 528.17 points or 0.79% to 67,127.08. The Nifty 50 index advanced 176.40 points or 0.89% to 19,996.35. The Nifty hit an all-time high of 20,008.15 in late trade.

**Corporate News:** Reliance Retail Ventures (RRVL) announced that global investment firm KKR, through an affiliate, will invest Rs 2,069.50 crore into RRVL, a subsidiary of RIL. This investment values RRVL at a pre-money equity value of Rs 8.361 lakh crore, which makes it among the top four companies by equity value in the country. Lupin plans to enter into a business transfer agreement with Lupin Manufacturing Solutions Limited (LMSL), wholly owned subsidiary of the company, to carve out two Active Pharmaceutical Ingredients (API) manufacturing sites at Dabhasa and Visakhapatnam and select R&D operations, including fermentation, at Lupin Research Park, Pune.



## FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (11.7)        | (111.5)    | 176.1      |
| 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) | 99,430        | 83,322         | 70,120         |
| F&O(INR cr)  | 23,793,371    | 28,500,809     | 27,383,866     |

## MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 13.8          | 13.8           | 15.7           |
| NSE VIX  | 11.4          | 11.0           | 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  | 45,571        | 0.9 %       | 11.7 %       | Energy      | 27,717        | 1.0 %       | 21.5 %       |
| IT     | 32,643        | 0.7 %       | 14.0 %       | Pharma      | 15,310        | 0.4 %       | 26.9 %       |
| Metals | 7,104         | 1.8 %       | 29.7 %       | Finance     | 20,305        | 0.8 %       | 11.8 %       |
| Auto   | 16,375        | 1.7 %       | 31.8 %       | PSU         | 4,854         | 3.1 %       | 29.2 %       |
| FMCG   | 52,239        | 0.9 %       | 14.2 %       | Real Estate | 597           | 0.9 %       | 52.6 %       |

## 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Adani Port         | 882           | 7.0 %       | 40.6 %       | I R C T C         | 717           | (1.1) %     | 25.8 %       |
| Canara Ban         | 360           | 6.1 %       | 25.3 %       | Coal India        | 279           | (1.1) %     | 26.7 %       |
| HDFC AMC           | 2,664         | 5.1 %       | 54.0 %       | Shree Ceme        | 25,797        | (0.7) %     | (1.8) %      |
| Adani Ener         | 875           | 5.0 %       | (7.3) %      | O N G C           | 183           | (0.6) %     | 19.4 %       |
| Adani Ente         | 2,615         | 3.8 %       | 52.3 %       | Hind.Aeron        | 4,083         | (0.6) %     | 50.5 %       |

## EVENTS CALENDAR

| <i>EVENT</i>                  | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|-------------------------------|-------------|------------------|---------------|---------------|-----------------------|
| Westpac Consumer Sentiment    | 12-09-2023  | 06:00            | AUD           | -             | (0.004)               |
| NAB Business Confidence       | 12-09-2023  | 07:00            | AUD           | -             | 2                     |
| German ZEW Economic Sentiment | 12-09-2023  | 14:30            | EUR           | -             | (12.3)                |
| MPC Member Mann Speaks        | 12-09-2023  | 04:30            | GBP           | -             | -                     |
| Claimant Count Change         | 12-09-2023  | 11:30            | GBP           | -             | -                     |
| Visitor Arrivals m/m          | 12-09-2023  | 04:15            | NZD           | -             | 0.113                 |
| NFIB Small Business Index     | 12-09-2023  | 15:30            | USD           | -             | 91.9                  |
| 10-y Bond Auction             | 12-09-2023  | 22:31            | USD           | -             | -                     |

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