



13 Sep.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	19,993	(0.0) %	14.9 %
BSE SENSEX	67,221	0.1 %	13.7 %
CNX BANK	45,511	(0.1) %	11.5 %
CNX MIDCAP	40,170	(3.1) %	33.2 %
CNX SMALLCAP	12,450	(4.1) %	37.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,646	(0.1) %	4.6 %
S&P 500	4,462	(0.6) %	16.7 %
FTSE 100	7,528	0.4 %	(0.4) %
HANG SENG	18,026	(0.4) %	(10.5) %
NIKKEI	32,776	1.0 %	27.5 %
SHANGHAI COMPOSITE	3,137	(0.2) %	0.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	82.96	(0.3) %	0.4 %
EUR/USD	1.07	(0.1) %	0.0 %
GBP/USD	1.25	(0.1) %	3.1 %
USD/JPY	147.76	0.2 %	12.7 %
USD/AUD	1.57	0.1 %	6.9 %
USD/SGD	1.37	0.1 %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	87	(0.3) %	13.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,929	0.2 %	4.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,154	1.0 %	(7.9) %
Copper(USD/MT)	8,333	1.3 %	(0.7) %

FIXED INCOME

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

Global Economy: U.S. NFIB's Small Business Optimism Index decreased 0.6 of a point in August to 91.3, the 20th consecutive month below the 49-year average of 98. Twenty-three percent of small business owners in the U.S. reported that inflation was their single most important business problem, up two points from last month. The net percent of owners raising average selling prices increased two points to a net 27% (seasonally adjusted), still at an inflationary level. Germany's wholesale price index, or WPI, declined 2.7 percent year-on-year after a 2.8 percent fall in the previous month, preliminary figures from the statistical office Destatis showed. Compared to the previous month, the WPI rose 0.2 percent, reversing a 0.2 percent fall in July. Germany's economic sentiment unexpectedly improved in September as interest rates are estimated to have peaked in the euro area and the U.S., but financial market experts' assessment of the current situation turned more pessimistic, survey data from the ZEW-Leibniz Centre for European Economic Research showed Tuesday. The ZEW Indicator of Economic Sentiment unexpectedly rose to a three-month high of -11.4 in September from -12.3 in August. The ZEW Indicator of Economic Sentiment unexpectedly rose to a three-month high of -11.4 in September from -12.3 in August. The UK unemployment rate rose to 4.3 percent in the three months to July from 4.2 percent in the preceding period, the Office for National Statistics reported. Producer prices in Japan were up 0.3 percent on month in August, the Bank of Japan reported. On a yearly basis, producer prices climbed 3.2 percent.

Global Indices: The tech-heavy Nasdaq slumped 144.28 points or 1.0 percent to 13,773.61, largely offsetting the strong gain posted on Monday. The S&P 500 also fell 25.56 points or 0.6 percent to 4,461.90, while the Dow edged down 17.73 points or 0.1 percent to 34,645.99.

Indian Economy: India's retail inflation as measured by All India Consumer Price Index (CPI) moderated to 6.83% in August 2023 compared to same month last year. Inflation had hit 7.4% in July, government data showed. The Index of Industrial Production (IIP) spiked by 5.7% in July, up from 3.7% in June 2023. The manufacturing sector output rose by 4.6% in July this year.

Equity Market: The barometer index, the S&P BSE Sensex added 94.05 points or 0.14% to 67,221.13. The Nifty 50 index shed 3.15 points or 0.02% to 19,993.20.

Corporate News: Wipro Holdings (UK) Limited (wholly-owned subsidiary) has transferred 100% shareholding in Wipro 4C NV (step-down subsidiary) to Wipro IT Services UK Societas (wholly-owned subsidiary), effective 12 September 2023. Based on achievement of approved norms and due approvals, Unit-1 of 800 MW capacity of Stage-I (2 x 800 MW) of Telangana Super Thermal Power Project, has successfully completed trial operation and consequently included in the installed capacity of NTPC. With this, installed capacity of NTPC and NTPC group has become 57838 MW and 73824 MW respectively.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	177.0	(70.3)	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)	117,597	87,606	70,548
F&O(INR cr)	44,560,257	30,508,240	27,538,608

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.8	13.8	15.7
NSE VIX	11.7	11.1	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	45,511	(0.1) %	11.5 %	Energy	27,025	(2.5) %	18.5 %
IT	32,978	1.0 %	15.2 %	Pharma	15,329	0.1 %	27.0 %
Metals	6,915	(2.7) %	26.2 %	Finance	20,304	(0.0) %	11.8 %
Auto	16,070	(1.9) %	29.3 %	PSU	4,738	(2.4) %	26.2 %
FMCG	52,066	(0.3) %	13.8 %	Real Estate	577	(3.2) %	47.7 %

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>
TCS	3,581	2.9 %	11.9 %	Bharat Ele	134	(7.3) %	38.9 %
Larsen & T	2,944	1.7 %	35.7 %	Indus Towe	182	(5.5) %	26.7 %
Infosys	1,501	1.7 %	6.4 %	GAIL (Indi	122	(4.9) %	15.9 %
Divi's Lab	3,788	1.4 %	31.8 %	A B B	4,402	(4.7) %	30.5 %
UltraTech	8,572	1.3 %	12.2 %	B P C L	348	(4.2) %	5.6 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Italian Quarterly Unemployment Rate	13-09-2023	13:30	EUR	-	0.08
Industrial Production m/m	13-09-2023	14:30	EUR	-	0.005
GDP m/m	13-09-2023	11:30	GBP	-	0.005
CB Leading Index m/m	13-09-2023	19:00	GBP	-	(0.008)
BSI Manufacturing Index	13-09-2023	05:20	JPY	-	(0.4)
FPI m/m	13-09-2023	04:15	NZD	-	(0.005)
Core CPI m/m	13-09-2023	18:00	USD	-	0.002
Crude Oil Inventories	13-09-2023	20:00	USD	-	-
30-y Bond Auction	13-09-2023	22:31	USD	-	-
Federal Budget Balance	13-09-2023	23:30	USD	-	-

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