



14 Aug.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| CNX NIFTY | 11,300 | 0.0 % | 36.9 % |
| BSE SENSEX | 38,310 | (0.2) % | 35.9 % |
| CNX BANK | 22,196 | 0.0 % | 21.9 % |
| CNX MIDCAP | 16,525 | 0.0 % | 44.1 % |
| CNX SMALLCAP | 5,434 | 0.0 % | 53.5 % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 27,897 | (0.3) % | (2.2) % |
| S&P 500 | 3,373 | (0.2) % | 4.4 % |
| FTSE 100 | 6,186 | (1.5) % | (18.7) % |
| HANG SENG | 25,231 | (0.1) % | (11.6) % |
| NIKKEI | 23,250 | 1.8 % | 0.2 % |
| SHANGHAI COMPOSITE | 3,321 | 0.0 % | 7.6 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 74.60 | (0.2) % | 4.8 % |
| EUR/USD | 1.18 | (0.0) % | 4.9 % |
| GBP/USD | 1.30 | (0.2) % | (1.1) % |
| USD/JPY | 106.81 | 0.9 % | (1.7) % |
| USD/AUD | 1.40 | 0.2 % | (1.8) % |
| USD/SGD | 1.37 | (0.0) % | 2.0 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 42 | (1.0) % | (31.0) % |
| Gold(INR/10g) | 52,441 | (2.4) % | 34.5 % |
| Gold Comex(USD/oz) | 1,957 | 1.1 % | 26.9 % |
| SILVER(INR/1Kg) | 66,716 | (3.9) % | 44.9 % |
| Aluminium(USD/MT) | 1,738 | (0.9) % | (1.9) % |
| Copper(USD/MT) | 6,380 | 0.0 % | 3.5 % |

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 | 0.1 % | (1.2) % |

Global Economy: The US Labor Department said initial jobless claims tumbled to 963,000, a decrease of 228,000 from the previous week's revised level of 1.191 million. This marked the first time since mid March that the claims fell under 1 Million level. German consumer price index fell 0.1% in July, after a 0.9% rise in June, mainly due to the reduction in the value added tax, final data from Destatis revealed on Thursday. On a monthly basis, consumer prices fell 0.5% July, as estimated. Prices for transport declined the most, by 3.2% yearly in July and communication cost fell 2.5%. Prices for clothing and footwear, and furniture, household equipment decreased by 0.7% and 0.4%, respectively. Japan producer prices were up 0.6% on month in July, following the 0.6% increase in June, the Bank of Japan said on Thursday. On a yearly basis, producer prices sank 0.9% following the 1.6% drop in the previous month. Export prices were up 0.8% on month and down 3.2% on year, the bank said, while import prices climbed 1.9% on month and tumbled 12.6% on year. Australia unemployment rate was a seasonally adjusted 7.5% in July, up from 7.4% in June, the Australian Bureau of Statistics said on Thursday. The Australian economy added 114,700 jobs last month to 12,460,800, following the addition of 210,800 jobs in the previous month.

Global Equities: US stocks eased from intraday highs as stimulus talks among US lawmakers appeared to have hit a dead end.

Indian Economy: The Reserve Bank Of India (RBI) reported that currency in circulation rose 0.5% on the week to stand at Rs 26.86 lakh crore as on August 7th 2020. The central bank stated further that the overall reserve money grew by 0.20% on the week to Rs 31.87 lakh crore. Currency in circulation rose around 22.4% on a year ago basis compared to 13.3% rise 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 increased by 5.2%. The Prime Minister Narendra Modi has launched Transparent Taxation - Honoring the Honest' platform today. The PMI says it will strengthen the efforts of reforming and simplifying India's tax system. Faceless Appeal Scheme to be implemented from 25th September 2020 which will bring a new era of Trust, Transparency, and Tax. It is a big step in bringing together rights and duties, and clarifying government's responsibilities towards the taxpayer. The charter ensures dignity of the taxpayer, says the PM.

Equity Markets: The domestic equity benchmarks ended with small losses on Thursday. Trading was volatile due to weekly expiry of index options. As per provisional closing data, the barometer index, the S&P BSE Sensex, fell 59.14 points or 0.15% at 38,310.49. The Nifty 50 index lost 7.95 points or 0.07% at 11,300.45. The broader market outperformed the benchmarks.

Corporate News: Hero MotoCorp said on Thursday it is already seeing green shoots and expects them to sustain and strengthen towards the festive season. The company's standalone net profit for the June quarter plunged 95.12% to Rs 61.31 crore while revenue from operations dropped 63% to Rs 2,971.54 crore on yoy basis. Jindal Steel & Power Limited (JSPL) has started supply of 1,080 grade Head Hardened rails to Rail Vikas Nigam Limited for the completion of Kolkata Metro's Joka-Esplanade corridor. Larsen & Toubro has bagged orders for sewage treatment plant, buildings and factories, the engineering major said. The company did not disclose the size of the orders but stated that these orders together are in the range of Rs 1,000 crore- Rs 2,500 crore.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 462.2 | 443.4 | 99.6 |
| MF(INR cr) | (65.8) | (359.6) | (148.7) |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 62,220 | 63,672 | 56,136 |
| F&O(INR cr) | 3,370,834 | 1,904,077 | 1,574,698 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 22.1 | 23.0 | 31.6 |
| NSE VIX | 20.6 | 22.6 | 32.4 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 22,196 | (0.3) % | 21.9 % | Energy | 15,541 | (0.1) % | 44.3 % |
| IT | 18,107 | 0.2 % | 50.3 % | Pharma | 11,478 | (1.0) % | 63.3 % |
| Metals | 2,381 | 1.1 % | 53.2 % | Finance | 10,978 | (0.2) % | 22.8 % |
| Auto | 7,880 | 1.2 % | 69.2 % | PSU | 1,463 | (1.0) % | 14.0 % |
| FMCG | 31,668 | 0.1 % | 20.1 % | Real Estate | 209 | 0.9 % | 21.4 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Interglobe | 1,161 | 12.2 % | 16.2 % | Aurobindo | 881 | (5.7) % | 124.6 % |
| Shriram Tr | 702 | 5.6 % | 15.5 % | Adani Tran | 241 | (2.4) % | 27.2 % |
| Tata Motor | 131 | 4.6 % | 93.0 % | Bharti Air | 535 | (2.3) % | 27.1 % |
| Hindalco I | 184 | 4.4 % | 100.3 % | Bandhan Ba | 291 | (2.2) % | 49.3 % |
| Larsen & T | 991 | 4.3 % | 27.9 % | Sun Pharma | 521 | (2.1) % | 51.6 % |

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 | | | | | |

..... End of Report