



14 Sep.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,464	0.1 %	38.9 %
BSE SENSEX	38,855	0.0 %	37.5 %
CNX BANK	22,480	0.1 %	23.5 %
CNX MIDCAP	16,766	0.7 %	46.2 %
CNX SMALLCAP	5,650	0.3 %	59.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,666	0.5 %	(3.1) %
S&P 500	3,341	0.1 %	3.4 %
FTSE 100	6,032	0.5 %	(20.7) %
HANG SENG	24,503	0.8 %	(14.2) %
NIKKEI	23,406	0.7 %	0.9 %
SHANGHAI COMPOSITE	3,260	0.8 %	5.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.33	(0.1) %	3.0 %
EUR/USD	1.18	0.4 %	5.6 %
GBP/USD	1.29	(0.4) %	(2.0) %
USD/JPY	106.14	0.0 %	(2.3) %
USD/AUD	1.37	(0.3) %	(3.6) %
USD/SGD	1.37	(0.1) %	1.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	0.1 %	(39.0) %
Gold(INR/10g)	51,350	(0.1) %	31.7 %
Gold Comex(USD/oz)	1,955	0.3 %	26.7 %
SILVER(INR/1Kg)	65,200	(1.0) %	41.6 %
Aluminium(USD/MT)	1,747	0.2 %	(1.4) %
Copper(USD/MT)	6,758	0.7 %	9.6 %

**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) %	(1.3) %

**Global Economy:** A report released by the US Labor Department on Friday showed consumer prices in the US rose by 0.4% in August after advancing by 0.6% for two straight months. UK gross domestic product expanded 6.6% in July from June, when it gained 8.7%, data published by the Office for National Statistics showed Friday. In three months to July, GDP fell 7.6% from the previous three months. Data showed that the growth in services output eased to 6.1% in July from 7.7% in June. Japan producer prices were up 0.2% on month in August, down from 0.8% in July, the Bank of Japan said on Friday. On a yearly basis, producer prices fell 0.5% following the 0.9% decline in the previous month. Export prices were up 0.4% on month and down 1.5% on year in August, the bank said, while import prices gained 1.2% on month but tumbled 10.9% on year.

**Global Equities:** US stocks saw choppy moves on Friday. The tech heavy NASDAQ continued to face selling pressure.

**Indian Economy:** India's industrial production declined 10.4% in July 2020, recording double digit decline for fifth straight month. However, the pace of decline continued to moderate and was lowest pace of decline in the last 5 months. Securities and Exchange Board of India (SEBI) has altered the portfolio allocation rules for multi-cap mutual funds. SEBI has stated 75% of total assets of multi-cap funds have to be invested in equity and equity-related instruments compared to the earlier threshold of 65%. SEBI also stated that multi cap schemes will have to invest at least 25% each in large cap, mid cap and small cap stocks. However, SEBI clarified that multi-cap schemes need not necessarily churn their portfolios by selling largecap stocks or buying smallcaps in multi-cap schemes to meet the new norms, but can also exercise options such as merging schemes with largecap funds, re-positioning them as large- and midcap schemes, or facilitating unitholders' switch to another scheme. The market regulator said that fund houses can use these options among other things and also added that it will examine if any proposals are submitted by the industry to meet desired objective of true-to-label and appropriate benchmarking.

**Equity Markets:** The equity market benchmarks ended with minor gains after a volatile trade on Friday. The barometer index, the S&P BSE Sensex added 14.23 points or 0.04% at 38,854.55. The Nifty 50 index advanced 15.20 points or 0.13% at 11,464.45. In the broader market, the S&P BSE Mid-Cap index rose 0.58% while the S&P BSE Small-Cap index gained 0.52%.

**Corporate News:** The auto component industry is seeking a breather in terms of introduction of new regulations and a long-term roadmap for rolling out new norms for the sector in order to prepare accordingly for the transition which entails heavy investments, industry body ACMA has said. BHEL reported a loss of Rs 893.1 crore in Q1FY21 against a Rs 218.9 crore loss in same period last fiscal. Revenue also fell to Rs 1,990.9 crore versus Rs 4,532.5 crore YoY. Goa Carbon will be in focus as company said it resumed operations at Paradeep unit. UPL will be watched as LIC raised the stake in the company to 7.07% from 5.06% earlier.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	125.4	(19.4)	102.3
MF(INR cr)	68.6	(404.3)	(203.4)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	54,500	55,731	55,716
F&O(INR cr)	1,121,889	2,175,744	1,653,320

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.9	29.4	30.6
NSE VIX	20.7	21.6	30.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,480	0.1 %	23.5 %	Energy	15,942	(0.2) %	48.0 %
IT	18,633	1.3 %	54.7 %	Pharma	11,313	0.1 %	61.0 %
Metals	2,384	0.6 %	53.5 %	Finance	10,967	(0.0) %	22.6 %
Auto	7,957	0.1 %	70.8 %	PSU	1,442	0.8 %	12.4 %
FMCG	30,972	0.6 %	17.5 %	Real Estate	215	1.3 %	24.9 %

### 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>
Hindustan	238	7.4 %	48.1 %	Zee Entert	218	(2.3) %	80.4 %
Container	384	4.4 %	20.9 %	ICICI Pru	439	(1.8) %	28.2 %
Indraprast	403	3.8 %	3.2 %	IndusInd B	610	(1.6) %	78.3 %
SBI Cards	849	3.6 %	39.7 %	ACC	1,322	(1.6) %	37.2 %
ICICI Lomb	1,298	3.6 %	17.4 %	Power Grid	175	(1.4) %	13.3 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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