



14 Sep.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	20,070	0.0 %	15.4 %
BSE SENSEX	67,467	0.4 %	14.1 %
CNX BANK	45,909	0.0 %	12.5 %
CNX MIDCAP	40,245	0.0 %	33.4 %
CNX SMALLCAP	12,577	0.0 %	38.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,576	(0.2) %	4.3 %
S&P 500	4,467	0.1 %	16.8 %
FTSE 100	7,526	(0.0) %	(0.4) %
HANG SENG	18,009	(0.1) %	(10.6) %
NIKKEI	32,707	(0.2) %	27.2 %
SHANGHAI COMPOSITE	3,123	(0.5) %	0.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	82.82	(0.2) %	0.2 %
EUR/USD	1.07	0.3 %	0.3 %
GBP/USD	1.25	0.2 %	3.3 %
USD/JPY	146.95	(0.6) %	12.1 %
USD/AUD	1.56	(0.8) %	6.1 %
USD/SGD	1.36	(0.4) %	1.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	89	1.8 %	15.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,913	(0.8) %	4.0 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,153	(0.0) %	(7.9) %
Copper(USD/MT)	8,338	0.1 %	(0.6) %

FIXED INCOME

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

Global Economy: The US Inflation saw its biggest monthly increase this year in August. The consumer price index, which measures costs across a broad variety of goods and services, rose 0.6% for the month, and was up 3.7% from a year ago. However, excluding volatile food and energy, core CPI increased 0.3% and 4.3% respectively. In July 2023, the seasonally adjusted industrial production decreased by 1.1% in both the euro area and the EU, compared with June 2023, according to estimates from Eurostat, the statistical office of the European Union. In June 2023, industrial production increased by 0.4% in both the euro area and the EU. UK's monthly production output is estimated to have risen 1.8% in June 2023, the strongest monthly growth to the Index of Production (IoP) since August 2020. For July 2023, UK's monthly real gross domestic product (GDP) is estimated to have fallen by 0.5%, with falls in all three main sectors, following growth of 0.5% in June 2023, data by Office for National Statistics showed. Looking at the broader picture, GDP increased by 0.2% in the three months to July 2023, with growth in all three main sectors. Producer prices in Japan were up 0.3% on month in August, the Bank of Japan said. On a yearly basis, producer prices climbed 3.2% - down from the downwardly revised 3.4% increase in the previous month (originally 3.6%).

Global Equities: Stocks turned lower as inflationary worries weighed on the sentiments. European economic data was weak.

Indian Economy: The Reserve Bank of India (RBI) showed in a latest update that United States emerged as the leading source of foreign direct investment (FDI) in India during the fiscal year 2023 or FY23. Mauritius, the United Kingdom, and Singapore followed the United States and collectively contributed 60% of the total FDI inflow into India. In terms of market value, the FDI amounted to Rs 49.93 lakh crore in FY23, up 6.9% compared to the previous fiscal. The United States brought in Rs 8.58 lakh crore or \$103 billion in FDI during FY23, up from Rs 8.05 lakh crore in the previous fiscal year, representing a 17.2% share of the total FDI.

Equity Markets: The key domestic indices ended with decent gains on Thursday. The Nifty settled above the 20,050 mark. PSU bank, Media and oil& gas shares in demand while auto and IT stocks declined. As per provisional closing data, the barometer index, the S&P BSE Sensex, was up 245.86 points or 0.37% to 67,466.99. The Nifty 50 index added 76.80 points or 0.38% to 20,070.

Corporate News: The government on Wednesday approved a foreign investment of up to Rs 9,589 crore in Suven Pharmaceuticals by Cyprus-based. Power Finance Corporation (PFC) has received shareholders' approval to issue bonus shares by capitalising up to Rs 660.02 crore in its securities premium account. Bank of India on September 13 said it raised Rs 2,000 crore through Basel III compliant Tier II bonds maturing in 10 years at 7.88 percent coupon. As per the bank's statement, BOI received a total of 83 bids amounting to Rs 3,770 crore. Out of these, there were 48 successful bidders totaling Rs 2,000 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(39.9)	(66.5)	174.1
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)	91,242	88,010	70,733
F&O(INR cr)	54,966,878	33,225,866	27,783,503

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.2	13.9	15.6
NSE VIX	11.8	11.2	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	45,909	0.9 %	12.5 %	Energy	27,275	0.9 %	19.6 %
IT	32,887	(0.3) %	14.9 %	Pharma	15,449	0.8 %	28.0 %
Metals	6,944	0.4 %	26.8 %	Finance	20,387	0.4 %	12.2 %
Auto	15,996	(0.5) %	28.7 %	PSU	4,939	4.2 %	31.5 %
FMCG	52,224	0.3 %	14.2 %	Real Estate	581	0.7 %	48.7 %

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>
Canara Ban	365	4.6 %	27.0 %	Info Edg.(4,396	(2.7) %	18.9 %
Bank of Ba	209	4.4 %	23.3 %	Adani Gree	986	(1.9) %	17.7 %
Grasim Ind	1,933	3.3 %	18.7 %	Interglobe	2,447	(1.8) %	28.8 %
Coal India	280	3.3 %	27.0 %	Adani Ener	837	(1.8) %	(11.3) %
Tata Consu	889	2.8 %	24.0 %	HDFC Life	650	(1.6) %	29.1 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
MI Inflation Expectations	14-09-2023	06:30	AUD	-	0.049
Employment Change	14-09-2023	07:00	AUD	-	-
Wholesale Sales m/m	14-09-2023	18:00	CAD	-	(0.028)
PPI m/m	14-09-2023	12:00	CHF	-	(0.001)
Main Refinancing Rate	14-09-2023	17:45	EUR	-	0.0425
ECB Press Conference	14-09-2023	18:15	EUR	-	-
RICS House Price Balance	14-09-2023	04:31	GBP	-	(0.53)
Core Machinery Orders m/m	14-09-2023	05:20	JPY	-	0.027
Revised Industrial Production m/m	14-09-2023	10:00	JPY	-	(0.02)
Business Inventories m/m	14-09-2023	19:30	USD	-	0
Natural Gas Storage	14-09-2023	20:00	USD	-	-

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