



15 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,440	(0.2) %	38.6 %
BSE SENSEX	38,757	(0.3) %	37.1 %
CNX BANK	22,101	(1.7) %	21.4 %
CNX MIDCAP	17,207	2.6 %	50.0 %
CNX SMALLCAP	5,958	5.4 %	68.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,993	1.2 %	(1.9) %
S&P 500	3,384	1.3 %	4.7 %
FTSE 100	6,026	(0.1) %	(20.8) %
HANG SENG	24,640	0.6 %	(13.7) %
NIKKEI	23,559	0.7 %	1.5 %
SHANGHAI COMPOSITE	3,279	0.6 %	6.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.29	(0.2) %	2.9 %
EUR/USD	1.18	0.5 %	5.6 %
GBP/USD	1.28	(1.4) %	(3.0) %
USD/JPY	106.18	0.1 %	(2.3) %
USD/AUD	1.37	(0.5) %	(3.7) %
USD/SGD	1.37	(0.0) %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	0.1 %	(39.0) %
Gold(INR/10g)	51,260	(0.2) %	31.5 %
Gold Comex(USD/oz)	1,955	0.3 %	26.7 %
SILVER(INR/1Kg)	65,139	(0.1) %	41.4 %
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: The World Health Organization or WHO reported the biggest daily rise in coronavirus cases across the world on Sunday. With 307,930 new cases reporting in the last 24 hours, the total number of global COVID infections reached 28637952. Half of these cases are in the Americas. The latest surge broke the previous one-day record of 306,857 new infections that WHO reported on September 6. Eurozone industrial production rose 4.1% from June, when it grew 9.5%, which was revised from 9.1% reported initially, preliminary data from Eurostat showed on Monday. Production gained for a third straight month as the economy attempts to sustain its recovery from the slump caused by the coronavirus, or Covid-19 pandemic. Compared to the same month last year, industrial production fell 7.7% in July after a 12% slump in June, revised from 12.3%. Japan's industrial production rose slightly more than initial estimates in July, final data from the Ministry of Economy, Trade and Industry showed on Monday. Industrial production rose a seasonally adjusted 8.7% monthly in July. The initial estimate was 8%. Shipments rose 6.6% month-on-month in July versus a 6% increase in the initial estimate. Inventories fell 1.5% month-on-month in July. Japan's industrial output on a yearly basis, declined 15.5% in July. According to the initial estimate, output slipped 16.1%. The capacity utilization jumped 9.6% monthly in July and fell 19.2% from a year ago.

Global Equities: US stocks surged with IT counters rebounding sharply after AstraZeneca said it resumed a late-stage clinical trial of its coronavirus vaccine.

Indian Economy: India's Consumer Price Inflation (CPI) stood at 6.69% in the month of August 2020, easing from 6.73% in July 2020 the data released by the Ministry of Statistics & Programme Implementation (MoSPI) showed. The Consumer Food Price Index (CFPI) stood at 9.05% compared to 9.27% in previous month. The price data were collected from representative and selected 1114 urban markets and 1181 villages covering all States/UTs. The government sought Parliament's approval for infusing Rs 20,000 crore in public sector banks in the current financial year to meet regulatory requirements. This is part of the first batch of Supplementary Demands for Grants for 2020-21 moved by Finance Minister Nirmala Sitharaman in the Lok Sabha. The Reserve Bank Of India or RBI has invited a reference to an circular in terms of which banks were advised to have appropriate IT system in place for identification of Non-Performing Assets (NPA) and generation of related data/returns, both for regulatory reporting and bank's own MIS requirements.

Equity Markets: The main stock indices ended a roller-coaster session with modest losses on Monday. The Nifty regained the 11,400 mark after slipping below that level in intraday trade. Selling in banks eclipsed rally in IT shares. The barometer index, the S&P BSE Sensex fell 97.92 points or 0.25% at 38,756.63. It jumped 375.61 points to hit the day's high of 39,230.16 in mid-morning trade.

Corporate News: Zensar Technologies has launched blockchain-based contract management solution for companies. Central Bank of India has reduced its marginal cost of funds-based lending rates (MCLR) by 5 basis points (bps) across all tenors, effective from Tuesday. The city-based lender has cut the one-year MCLR to 7.10% from 7.15%. Vedanta, SpiceJet, Max India, Alankit, Allcargo Logistics, ARSS Infrastructure Projects, DB Realty, Future Enterprises, Kalyani Forge, Liberty Shoes will be in focus ahead of latest earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	334.5	19.9	104.4
MF(INR cr)	(17.9)	(349.5)	(202.5)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	67,431	57,031	55,822
F&O(INR cr)	1,555,698	2,113,740	1,652,456

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.9	29.4	30.6
NSE VIX	21.2	21.6	30.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,101	(1.7) %	21.4 %	Energy	15,829	(0.7) %	46.9 %
IT	19,505	4.7 %	61.9 %	Pharma	11,233	(0.7) %	59.9 %
Metals	2,387	0.1 %	53.7 %	Finance	10,783	(1.7) %	20.6 %
Auto	8,035	1.0 %	72.5 %	PSU	1,435	(0.5) %	11.8 %
FMCG	30,761	(0.7) %	16.7 %	Real Estate	223	3.7 %	29.5 %

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>
HCL Techno	795	10.2 %	92.2 %	Hindustan	224	(5.8) %	39.6 %
TCS	2,491	4.9 %	45.8 %	Bharti Air	474	(3.6) %	12.5 %
Wipro	307	4.7 %	62.1 %	Avenue Sup	2,163	(3.4) %	3.8 %
Page Indus	19,149	3.8 %	15.3 %	Bandhan Ba	301	(3.3) %	54.6 %
Motherson	116	3.7 %	100.8 %	Bajaj Fina	3,441	(2.9) %	55.0 %

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					

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