



16 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,522	0.0 %	39.6 %
BSE SENSEX	39,044	0.7 %	38.1 %
CNX BANK	22,466	0.0 %	23.4 %
CNX MIDCAP	17,393	0.0 %	51.6 %
CNX SMALLCAP	6,049	0.0 %	70.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,996	0.0 %	(1.9) %
S&P 500	3,401	0.5 %	5.3 %
FTSE 100	6,106	1.3 %	(19.7) %
HANG SENG	24,733	0.4 %	(13.4) %
NIKKEI	23,455	(0.4) %	1.1 %
SHANGHAI COMPOSITE	3,296	0.5 %	6.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.34	0.0 %	3.0 %
EUR/USD	1.19	0.2 %	5.8 %
GBP/USD	1.28	(0.6) %	(2.6) %
USD/JPY	105.89	(0.2) %	(2.5) %
USD/AUD	1.37	(0.1) %	(3.7) %
USD/SGD	1.37	(0.2) %	1.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	38	2.7 %	(37.4) %
Gold(INR/10g)	51,915	1.3 %	33.1 %
Gold Comex(USD/oz)	1,955	0.2 %	26.8 %
SILVER(INR/1Kg)	66,684	2.4 %	44.8 %
Aluminium(USD/MT)	1,767	1.0 %	(0.3) %
Copper(USD/MT)	6,814	0.4 %	10.5 %

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	0.0 %	(1.2) %

Global Economy: The US Federal Reserve said industrial production climbed by 0.4% in August after rising by an upwardly revised 3.5% in July. The New York Fed said its general business conditions index jumped to 17.0 in September from 3.7 in August. China's industrial output rose 5.6% in August from a year ago, expanding for the fifth straight month in a boost to an economy trying to regain its footing from the shock of the coronavirus outbreak. In July, production rose 4.8%, as more businesses resumed production after Beijing managed to largely contain the epidemic and remove most of the nationwide virus curbs. Chinese retail sales rose 0.5% in August from a year ago, the first positive report for the year so far, China's National Bureau of Statistics said Tuesday. Notably, sales of communication equipment rose 25.1% from a year ago and that of autos rose 11.8%. Retail sales for the first eight months of the year were down 8.6% from a year ago, the bureau said. China's fixed-asset investment fell 0.3% year on year during the January-August period, with the decline narrowing from the 1.6% fall in the first seven months. German economic confidence rose in September, survey data from the ZEW Centre for European Economic Research showed Tuesday. The economic confidence index moved to 77.4 in September from 71.5 in the previous month. The current conditions index also improved to -66.2 from -81.3 a month ago. UK unemployment rate advanced in three months to July and payroll employment declined despite easing of lockdown measures, data from the Office for National Statistics revealed Tuesday. The jobless rate came in at 4.1% in three months to July, which was 0.2 percentage point higher than the previous quarter. Asian Development Bank, in its latest Outlook Update, said developing Asia's gross domestic product will fall 0.7% in 2020, in contrast to a 0.1% rise estimated in June.

Global Equities: The Dow ended flat as financials eased and overall focus shifted to the outcome of US FOMC meet on Wednesday.

Indian Economy: Asian Development Bank noted that in India, where lockdowns have stalled consumer and business spending, GDP contracted by a record 23.9% in the first quarter of its fiscal year (FY) and is forecast to shrink 9% in FY2020 before recovering by 8% in FY2021. The lender cited threat of a prolonged Covid-19 pandemic and a return to more stringent containment measures as the main risk to the outlook. Ministry of Commerce & Industry released the index numbers of wholesale price in India for the month of August, 2020 (Provisional) and for the month of June, 2020 (Final). The annual rate of inflation, based on monthly wholesale price index or WPI, stood at (0.16%) (Provisional) for the month of August, 2020 (over August, 2019) as compared to 1.17% during the corresponding month of the previous year.

Equity Markets: Benchmark indices ended with strong gains on Tuesday, tracking positive global cues. Banks and pharma shares rallied while auto and FMCG shares declined. The barometer index, the S&P BSE Sensex added 287.72 points or 0.74% at 39,044.35. The Nifty 50 index gained 81.75 points or 0.71% at 11,521.80.

Corporate News: Infosys said that US-based Essential Utilities selected Infosys as a strategic partner to drive its digital transformation. REC is set to infuse Rs 150 crore as equity in a Joint Venture alongwith Power Finance Corporation, Power Grid Corporation and NTPC, for the purpose of establishment/creation of Common Backend Infrastructure Facility (CBIF) for smart metres in the country. Aurobindo Pharma said Biotechnology Industry Research Assistance Council (BIRAC), set up by Department of Biotechnology (DBT), Government of India supported Aurobindo's COVID-19 vaccine development under the National Biopharma Mission.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	81.8	26.1	104.2
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)	56,566	56,984	55,829
F&O(INR cr)	1,580,955	2,065,305	1,651,829

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.6	28.7	30.5
NSE VIX	20.6	21.5	30.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,466	1.6 %	23.4 %	Energy	15,899	0.4 %	47.6 %
IT	19,627	0.6 %	62.9 %	Pharma	11,451	1.9 %	63.0 %
Metals	2,386	(0.1) %	53.6 %	Finance	10,926	1.3 %	22.2 %
Auto	8,034	(0.0) %	72.5 %	PSU	1,436	0.0 %	11.9 %
FMCG	30,712	(0.2) %	16.5 %	Real Estate	221	(0.7) %	28.6 %

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>
IndusInd B	633	3.9 %	85.1 %	HDFC AMC	2,307	(1.8) %	5.6 %
Motherson	121	3.9 %	108.6 %	Marico	365	(1.6) %	37.3 %
Lupin	1,001	3.4 %	72.8 %	Page Indus	18,870	(1.5) %	13.6 %
Ambuja Cem	217	3.0 %	38.8 %	Avenue Sup	2,136	(1.2) %	2.6 %
Info Edg.(3,534	2.9 %	75.5 %	Hindustan	221	(1.2) %	38.0 %

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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