



17 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,178	(1.1) %	35.4 %
BSE SENSEX	37,877	(1.1) %	34.0 %
CNX BANK	21,679	(2.3) %	19.1 %
CNX MIDCAP	16,383	(0.9) %	42.8 %
CNX SMALLCAP	5,369	(1.2) %	51.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,931	0.1 %	(2.1) %
S&P 500	3,373	(0.0) %	4.4 %
FTSE 100	6,090	(1.6) %	(19.9) %
HANG SENG	25,183	(0.2) %	(11.8) %
NIKKEI	23,289	0.2 %	0.4 %
SHANGHAI COMPOSITE	3,360	1.2 %	8.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.64	0.1 %	4.8 %
EUR/USD	1.18	0.5 %	5.4 %
GBP/USD	1.31	0.3 %	(0.8) %
USD/JPY	106.84	0.0 %	(1.7) %
USD/AUD	1.40	(0.3) %	(2.1) %
USD/SGD	1.37	(0.1) %	1.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	42	(1.0) %	(31.0) %
Gold(INR/10g)	52,688	0.5 %	35.1 %
Gold Comex(USD/oz)	1,957	1.1 %	26.9 %
SILVER(INR/1Kg)	67,317	0.9 %	46.2 %
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 consumer sentiment index edged up to 72.8 in August from 72.5 in July. The US Commerce Department said retail sales advanced by 1.2% in July after soaring by an upwardly revised 8.4% in June. The Fed said US industrial production surged up by 3% in July after soaring by an upwardly revised 5.7% in June. Despite the substantial increases seen over the past two months, the Fed noted production is still 8.4 percent below its pre-pandemic February level. China's industrial production grew 4.8% on a yearly basis in July, the same rate of growth as seen in June, data from the National Bureau of Statistics revealed Friday. At the same time, retail sales dropped 1.1% from last year. Sales had declined 1.8% in June. During January to July period, fixed asset investment decreased 1.6% versus a 3.1% decrease in January to June. Euro area economy contracted at a record pace in the second quarter, as initially estimated, due to the containment measures taken by member countries to control the spread of the coronavirus, flash estimate from Eurostat showed Friday. Gross domestic product fell 12.1% sequentially in the second quarter, following a 3.6% drop in the first quarter. This was the sharpest decline seen since the series began in 1995. Year-on-year, GDP was down 15% versus a 3.1% decline a quarter ago. This was also the sharpest decrease since 1995. Japan's tertiary industry activity rose 7.9% month-on-month in June, after a 2.9% fall in May, data from the Ministry of Economy, Trade and Industry showed on Friday. Data showed that the broad-ranging personal services increased 12.3% in June, and broad-ranging business services gained 5.1%. On a yearly basis, tertiary activity fell 8.6% in June, following a 16.8% decline in the previous month.

Global Equities: US stocks saw choppy moves as talks about a new coronavirus relief bill were at a stalemate.

Indian Economy: India's wholesale price inflation contracted 0.58% in July, sliding for the fourth month in a row, data released by the commerce and industry ministry on Friday showed. The deflation in June was 1.81% while for the month of May and April it was 3.37% and 1.57%, respectively. The country's retail inflation spiked to 6.93% in the month of July mainly on account of higher food prices. The retail inflation which is measured by the Consumer Price Index (CPI) for the month of June was also revised to 6.23% from 6.09%, the data revealed. India's foreign exchange reserves soared about 3.4 times in the March-end 2020 to August 7, 2020 period vis-a-vis the year-ago period.

Equity Markets: Domestic equity barometers ended with significant losses on Friday, tracking weak global cues. After trading in a narrow range for most part of the session, the key indices faced steep selling pressure in mid-afternoon trade. Banks and auto shares corrected while metal and pharma shares bucked trend. The barometer index, the S&P BSE Sensex slumped 433.15 points or 1.13% at 37,877.34. The Nifty 50 index lost 122.05 points or 1.08% at 11,178.40.

Corporate News: Steel demand is expected to decline significantly in 2020-21 in line with a projected contraction in the global economy due to the impact of coronavirus pandemic, Tata Steel has said in its annual report. Lupin announced results from its Phase 3 clinical trial to assess the efficacy and safety of single-dose Solosec in female patients with trichomoniasis. NLC India issued Commercial Paper of Rs 1,000 crore in favour of SBI Mutual Fund – SBI Liquid Fund.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	66.4	401.5	99.2
MF(INR cr)	(512.8)	(482.2)	(166.6)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	69,144	64,219	56,279
F&O(INR cr)	1,391,794	1,852,849	1,572,710

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.1	23.0	31.6
NSE VIX	21.7	22.5	32.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,679	(2.3) %	19.1 %	Energy	15,395	(0.9) %	42.9 %
IT	18,023	(0.5) %	49.6 %	Pharma	11,640	1.4 %	65.7 %
Metals	2,406	1.1 %	54.9 %	Finance	10,758	(2.0) %	20.3 %
Auto	7,678	(2.6) %	64.8 %	PSU	1,425	(2.6) %	11.1 %
FMCG	31,238	(1.4) %	18.5 %	Real Estate	207	(0.9) %	20.3 %

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>
Lupin	1,018	9.4 %	75.8 %	Eicher Mot	20,144	(7.1) %	54.9 %
Muthoot Fi	1,213	3.0 %	100.7 %	Tata Motor	125	(5.0) %	83.4 %
Siemens	1,212	2.9 %	11.7 %	Bosch	13,705	(4.8) %	48.4 %
JSW Steel	265	2.6 %	85.6 %	Power Fin.	91	(4.3) %	2.6 %
Cadila Hea	395	2.3 %	49.9 %	Bank of Ba	46	(4.2) %	(10.0) %

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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