



18 Aug.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,247	0.0 %	36.3 %
BSE SENSEX	38,051	0.5 %	34.6 %
CNX BANK	21,701	0.0 %	19.2 %
CNX MIDCAP	16,455	0.0 %	43.5 %
CNX SMALLCAP	5,415	0.0 %	52.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,845	(0.3) %	(2.4) %
S&P 500	3,382	0.3 %	4.7 %
FTSE 100	6,127	0.6 %	(19.4) %
HANG SENG	25,347	0.7 %	(11.2) %
NIKKEI	23,097	(0.8) %	(0.5) %
SHANGHAI COMPOSITE	3,439	2.3 %	11.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.59	(0.0) %	4.8 %
EUR/USD	1.18	0.7 %	5.6 %
GBP/USD	1.31	0.4 %	(0.8) %
USD/JPY	106.62	(0.2) %	(1.9) %
USD/AUD	1.39	(0.4) %	(2.2) %
USD/SGD	1.37	(0.2) %	1.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	2.1 %	(29.9) %
Gold(INR/10g)	52,690	0.0 %	35.1 %
Gold Comex(USD/oz)	1,981	1.2 %	28.4 %
SILVER(INR/1Kg)	67,668	0.5 %	46.9 %
Aluminium(USD/MT)	1,720	(0.6) %	(3.0) %
Copper(USD/MT)	6,440	1.5 %	4.4 %

**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 Homebuilder confidence matched a record high in the month of August, according to a report released by the National Association of Home Builders on Monday. The report said the NAHB/Wells Fargo Housing Market Index jumped to 78 in August after soaring to 72 in July. The New York Fed said its general business conditions index fell to 3.7 in August from 17.2 in July, although a positive reading still indicates growth in regional manufacturing activity. Japan's gross domestic product fell an annualized 27.8% on year in the second quarter of 2020, the Cabinet Office said on Monday's preliminary report, following the 2.2% drop in the previous three months. On a seasonally adjusted quarterly basis, GDP sank 7.8%, following the 0.6% slide in the three months prior. Capital expenditure was down 1.5% on quarter, following the 1.7% increase in Q1. Japan's industrial production rose a seasonally adjusted 1.9% monthly in June. In the initial estimate, output rose 2.7%. Shipments rose 4.8% month-on-month in June versus a 5.2% increase in the initial estimate. Inventories fell 2.4% month-on-month in June, as initially estimated. On a yearly basis, industrial production declined 18.2% in June.

**Global Equities:** US stocks stayed supported on improving economic cues and continued buying support. Tech stocks stayed firm.

**Indian Economy:** Ministry of Finance said that the Partial Credit Guarantee Scheme (PCGS) 2.0 has been extended with greater flexibility to respond to emerging demands. Under PCGS 2.0, PSBs have approved purchase of Bonds/ CPs rated AA/AA- issued by 28 entities and Bonds/CPs rated below AA- issued by 62 entities, amounting to Rs. 21,262 crore overall. Government has now decided to modify PCGS 2.0 for purchase of Bonds/CPs. Additional 3 months have been granted to build up the portfolio. At the end of six months, i.e. by 19.11.2020, the portfolio shall be crystallised based on actual amount disbursed, for the Guarantee to come into effect. At the portfolio level, AA and AA- investment sub-portfolio under the Scheme should not exceed 50% (instead of 25% stipulated earlier) of the total portfolio of Bonds/ CPs purchased by PSBs under the Scheme.

**Equity Markets:** Benchmark equity indices ended higher on Monday, snapping their three-day losing streak. Buying was seen across the board with auto, metal and IT stocks making the biggest moves. Positive Asian cues cheered investors. In the broader market, the S&P BSE Mid-Cap index rose 0.47%. The S&P BSE Small-Cap index added 0.91%.

**Corporate News:** Bharti Airtel will be in focus. The commercial papers issued on May 18 have been paid by the company on August 17 (on the maturity date). Hindustan Aeronautics, Gujarat Industries Power, SPML Infra, TCNS Clothing, Uflex will be watched ahead of their latest quarterly earnings. Metal and mining counters will be in focus following a spurt of more than 1.5% in COMEX Copper futures yesterday.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(25.1)	358.8	97.8
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)	54,173	63,306	56,256
F&O(INR cr)	1,246,229	1,797,702	1,569,199

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.4	22.8	31.5
NSE VIX	21.3	22.4	32.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,701	0.1 %	19.2 %	Energy	15,588	1.3 %	44.7 %
IT	18,224	1.1 %	51.3 %	Pharma	11,595	(0.4) %	65.0 %
Metals	2,464	2.4 %	58.6 %	Finance	10,784	0.2 %	20.6 %
Auto	7,866	2.4 %	68.9 %	PSU	1,416	(0.7) %	10.3 %
FMCG	31,545	1.0 %	19.7 %	Real Estate	209	1.0 %	21.5 %

### 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>
NTPC	95	7.8 %	17.7 %	Petronet L	254	(2.2) %	27.2 %
Motherson	127	5.9 %	119.2 %	Adani Tran	234	(2.0) %	23.4 %
Zee Entert	170	5.5 %	40.7 %	Aurobindo	863	(1.8) %	120.0 %
Eicher Mot	21,135	4.9 %	62.6 %	St Bk of I	193	(1.7) %	3.5 %
Hero Motoc	2,927	4.4 %	78.5 %	Torrent Ph	2,792	(1.7) %	42.5 %

### 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>					

..... End of Report .....