



18 Aug.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	16,615	0.3 %	11.8 %
BSE SENSEX	55,792	0.4 %	11.5 %
CNX BANK	35,867	(0.6) %	5.9 %
CNX MIDCAP	27,598	0.3 %	14.4 %
CNX SMALLCAP	10,095	(0.2) %	21.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,343	(0.8) %	15.5 %
S&P 500	4,448	(0.7) %	18.4 %
FTSE 100	7,181	0.4 %	9.3 %
HANG SENG	25,746	(1.7) %	(6.3) %
NIKKEI	27,424	(0.4) %	0.6 %
SHANGHAI COMPOSITE	3,447	(2.0) %	(1.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.99	(0.2) %	1.4 %
EUR/USD	1.18	0.5 %	(3.8) %
GBP/USD	1.39	0.2 %	1.6 %
USD/JPY	109.63	(0.7) %	6.3 %
USD/AUD	1.36	(0.2) %	4.6 %
USD/SGD	1.36	(0.2) %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	(1.7) %	41.3 %
Gold(INR/10g)	47,404	1.2 %	(7.1) %
Gold Comex(USD/oz)	1,784	0.2 %	(8.5) %
SILVER(INR/1Kg)	63,945	1.5 %	(7.1) %
Aluminium(USD/MT)	2,644	1.6 %	31.3 %
Copper(USD/MT)	9,377	(0.6) %	18.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	(0.0) %	0.3 %

Global Economy: The US retail sales slumped by 1.1% in July after climbing by an upwardly revised 0.7% in June. The US Fed said industrial production jumped by 0.9% in July after edging up by a downwardly revised 0.2% in June. Homebuilder confidence in the US tanked to its lowest level in a year in the month of August. The NAHB/Wells Fargo Housing Market Index tumbled to 75 in August from 80 in July. Euro area gross domestic product grew 2% sequentially, in contrast to a 0.3% drop in the first quarter, flash estimate from Eurostat showed on Tuesday. The quarter-on-quarter growth rate matched the flash estimate released on July 30. On a yearly basis, GDP rebounded 13.6% after shrinking 1.3% in the first quarter. The annual rate was revised down from 13.7%. UK's unemployment rate dropped 0.2 percentage points to 4.7% in the second quarter, versus the previous 4.8%, Office for National Statistics (ONS) showed on Tuesday. The number of people claiming jobless benefits showed a drop of 7.8K in July when compared to -114.8K seen previously. The claimant count rate came in at 5.7% vs. 5.7% last. The Reserve Bank of Australia (RBA) Minutes has stated that the recent outbreaks of the delta variant had interrupted the recovery which is pressuring the currency lower. Members therefore considered the case for delaying the tapering of bond purchases to \$4 billion a week currently scheduled for September 2021. They noted that the outlook for the economy is for a resumption of strong growth in 2022.

Global Equities: The DOW fell from record highs as Federal Reserve Chairman Jerome Powell said it remains to be seen how the US economy will weather the recent Covid-19 surge.

Indian Economy: India is set to launch a Financial Inclusion Index (FI-Index) to capture the extent of financial inclusion. The Reserve Bank of India informed about its formation on Tuesday. The annual FI-Index for the period ending March 2021 is 53.9 as against 43.4 for the period ending March 2017, showing drastic improvement in the past four years. The index will be published annually in July every year.

Equity Markets: The main indices extended record closing spree on Tuesday. The Nifty managed to end above the crucial 16,600 mark. IT, FMCG and pharma stocks advanced while metal, banks and financial shares declined.

Corporate News: Metal counters will be in focus as COMEX Copper slumped to a one month low in last session. Bharat Dynamics and MBDA signed agreement to establish advanced short range air-to-air missile facility in India. DCM Shriram Industries has entered into an agreement with Zyrone Dynamics Havacilik Danismanlik Ve Ar-Ge San. Tic. A.S., a company incorporated under the laws of the Republic of Turkey. The said company is engaged in the manufacturing and marketing of UAVs of different types. HCL Technologies won five-year IT transformation deal with Wacker Chemie AG, German multinational chemical company, to establish a modernized digital workplace and improve its quality-of-service delivery.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(15.3)	61.1	(3.8)
MF(INR cr)	712.3	468.3	395.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	68,868	62,845	71,371
F&O(INR cr)	5,459,691	5,540,272	4,854,114

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.5	17.1	17.8
NSE VIX	13.4	13.0	16.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,867	(0.6) %	5.9 %	Energy	19,722	(0.3) %	6.5 %
IT	33,415	2.6 %	28.6 %	Pharma	14,041	0.5 %	13.4 %
Metals	5,749	(2.3) %	37.2 %	Finance	17,371	(0.3) %	9.2 %
Auto	10,088	(0.0) %	0.7 %	PSU	2,322	(1.8) %	4.9 %
FMCG	37,479	1.4 %	7.5 %	Real Estate	390	(0.7) %	16.2 %

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>
Apollo Hos	4,921	13.2 %	70.0 %	Vedanta	303	(9.9) %	31.1 %
Adani Tran	1,024	4.7 %	2.5 %	Yes Bank	11	(3.8) %	(28.3) %
Petronet L	224	4.2 %	(1.8) %	NMDC	168	(2.8) %	21.0 %
L & T Info	4,959	3.9 %	20.6 %	Piramal En	2,702	(2.4) %	51.8 %
Tata Consu	833	3.8 %	28.1 %	JSW Steel	744	(2.3) %	46.3 %

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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