



18 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,516	(0.8) %	39.5 %
BSE SENSEX	38,980	(0.8) %	37.9 %
CNX BANK	22,320	(1.1) %	22.6 %
CNX MIDCAP	17,411	(0.2) %	51.8 %
CNX SMALLCAP	6,018	(0.5) %	70.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,902	(0.5) %	(2.2) %
S&P 500	3,357	(0.5) %	3.9 %
FTSE 100	6,050	(0.5) %	(20.4) %
HANG SENG	24,341	(1.6) %	(14.7) %
NIKKEI	23,319	(0.7) %	0.5 %
SHANGHAI COMPOSITE	3,270	(0.4) %	6.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.48	0.2 %	3.2 %
EUR/USD	1.18	(0.2) %	5.6 %
GBP/USD	1.29	0.7 %	(1.9) %
USD/JPY	105.11	(0.7) %	(3.3) %
USD/AUD	1.37	(0.5) %	(4.2) %
USD/SGD	1.36	(0.5) %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	4.9 %	(34.4) %
Gold(INR/10g)	51,495	(0.6) %	32.1 %
Gold Comex(USD/oz)	1,955	(0.3) %	26.7 %
SILVER(INR/1Kg)	64,896	(1.6) %	40.9 %
Aluminium(USD/MT)	1,744	24.5 %	(1.6) %
Copper(USD/MT)	6,761	(0.8) %	9.7 %

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 housing starts fell by 5.1% to an annual rate of 1.416 million in August after soaring by 17.9% to a revised rate of 1.492 million in July. The Philly Fed said its diffusion index for current activity slipped to 15.0 in September after dropping to 17.2 in August. The US Labor Department said initial jobless claims slipped to 860,000, a decrease of 33,000 from the previous week's revised level of 893,000. EU new car registrations slipped 18.9% from a year earlier in August compared with a 5.7% decline in July, the European Automobile Manufacturers Association said. In total, EU car sales fell by almost 2.9 million in the first eight months of 2020 compared with the same period the year before. Eurozone consumer prices fell 0.2% year-on-year in August, reversing a 0.4% rise in July, final data from Eurostat showed Thursday. This was the first decline since May 2016. Core inflation that excludes volatile energy, food, alcohol and tobacco, eased to a record 0.4% from 1.2% in July. The Bank of England kept its interest rate at a record low on Thursday, but policymakers started to assess how negative interest rates work. The nine-member Monetary Policy Committee unanimously decided to hold the interest rate at 0.10 percent. Policymakers also unanimously decided to retain the size of the asset purchase programme at GBP 745 billion. Japan's central bank policy board voted 8-1 to retain the interest rate at -0.1% on current accounts that financial institutions maintain at the central bank. The bank will continue to purchase necessary amount of Japanese government bonds without setting an upper limit so that 10-year JGB yields will remain at around zero percent.

Global Equities: The Dow continued to face selling pressure on economic worries and rising Covid-19 cases in Europe.

Indian Economy: Agriculture minister Narendra Singh Tomar on Thursday said the Minimum Support Price (MSP) mechanism for farmers will continue and that the mechanism will not be impacted by two proposed legislations. Moving for consideration The Farmers Produce Trade and Commerce (Promotion and Facilitation) Bill, 2020, and The Farmers (Empowerment and Protection) Agreement on Price Assurance and Farm Services Bill, 2020' in Lok Sabha, Tomar said the bills are aimed at making farming profitable.

Equity Markets: Domestic benchmark indices snapped a two-day rising streak on Thursday, tracking weak global cues. The S&P BSE Sensex lost 323 points or 0.82% at 38,979.85. The Nifty 50 index fell 88.45 points or 0.76% at 11,516.10. Both the indices rose 1.4% in the previous two sessions.

Corporate News: State Bank of India has about Rs 1.5 lakh crore in distressed assets, according to Rajnish Kumar, chairman and managing director, media reports noted. Hindalco Industries and Hindustan Copper signed a memorandum of understanding (MoU) for supply of copper concentrate. Dr Reddy's Laboratories settles patent litigation for Revlimid with Celgene, a Bristol Myers Squibb Company, which allowed the company to sell Lenalidomide in the US post March 2022.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	67.2	48.4	105.2
MF(INR cr)	(9.0)	(415.7)	(211.5)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	53,822	56,482	55,796
F&O(INR cr)	3,907,882	2,193,564	1,673,332

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.5	28.4	30.5
NSE VIX	20.1	21.2	29.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,320	(1.1) %	22.6 %	Energy	15,688	(0.9) %	45.6 %
IT	19,818	0.2 %	64.5 %	Pharma	11,736	0.4 %	67.0 %
Metals	2,363	(1.4) %	52.1 %	Finance	10,881	(1.2) %	21.7 %
Auto	8,129	(0.3) %	74.5 %	PSU	1,409	(1.3) %	9.8 %
FMCG	30,652	(0.6) %	16.3 %	Real Estate	223	(1.7) %	29.3 %

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>
Dr Reddy's	4,827	4.3 %	56.0 %	Hindalco I	176	(4.3) %	91.9 %
Zee Entert	221	2.4 %	82.9 %	DLF	157	(4.0) %	18.3 %
HCL Techno	808	2.4 %	95.5 %	NMDC	88	(2.8) %	12.3 %
ACC	1,410	1.4 %	46.3 %	ICICI Lomb	1,282	(2.6) %	15.9 %
Cadila Hea	394	1.4 %	49.2 %	Aurobindo	811	(2.6) %	106.7 %

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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