



18 Sep.2023

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|--------|
| CNX NIFTY | 20,192 | 0.4 % | 16.1 % |
| BSE SENSEX | 67,839 | 0.5 % | 14.8 % |
| CNX BANK | 46,232 | 0.5 % | 13.3 % |
| CNX MIDCAP | 40,830 | 0.3 % | 35.3 % |
| CNX SMALLCAP | 12,794 | 0.4 % | 41.2 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| DOW JONES | 34,618 | (0.8) % | 4.5 % |
| S&P 500 | 4,450 | (0.2) % | 16.4 % |
| FTSE 100 | 7,711 | 0.5 % | 2.1 % |
| HANG SENG | 18,183 | 0.8 % | (9.7) % |
| NIKKEI | 33,533 | 1.1 % | 30.4 % |
| SHANGHAI COMPOSITE | 3,118 | (0.3) % | 0.0 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 83.02 | 0.1 % | 0.4 % |
| EUR/USD | 1.07 | (0.4) % | (0.0) % |
| GBP/USD | 1.25 | (0.3) % | 3.0 % |
| USD/JPY | 147.29 | (0.1) % | 12.3 % |
| USD/AUD | 1.55 | (0.4) % | 5.9 % |
| USD/SGD | 1.36 | 0.0 % | 1.5 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 91 | 0.7 % | 18.0 % |
| Gold(INR/10g) | 51,317 | 0.1 % | 6.6 % |
| Gold Comex(USD/oz) | 1,927 | 0.5 % | 4.8 % |
| SILVER(INR/1Kg) | 66,740 | (0.3) % | 7.5 % |
| Aluminium(USD/MT) | 2,156 | (1.7) % | (7.8) % |
| Copper(USD/MT) | 8,377 | (0.6) % | (0.2) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 4.3 | 0.1 % | 0.5 % |

Global Economy: The Federal Reserve released a report on Friday showing U.S. industrial production increased by much more than expected in the month of August. The report said industrial production climbed by 0.4 percent in August following a downwardly revised 0.7 percent advance in July. The report said manufacturing output inched up by just 0.1 percent in August after rising by 0.4 percent in July. The Fed also reported that capacity utilization in the industrial sector edged up to 79.7 percent in August from an upwardly revised 79.5 percent in July. Import prices in the U.S. increased by more than expected in the month of August, according to a report released by the Labor Department. Import prices climbed by 0.5 percent in August following a downwardly revised 0.1 percent uptick in July. The report also said export prices spiked by 1.3 percent in August after climbing by a downwardly revised 0.5 percent in July. The euro area trade surplus declined sharply to a seasonally adjusted EUR 2.9 billion from EUR 8.6 billion in the previous month, data from Eurostat showed. Exports decreased 1.7 percent from a month ago, while imports grew 0.7 percent in July. On an unadjusted basis, the trade balance posted a surplus of EUR 6.5 billion compared to a deficit of EUR 36.3 billion in the same period last year. The services sector in New Zealand continued to contract in August, and at a faster rate, the latest survey from BusinessNZ revealed on Monday with a Performance of Services Index score of 47.1.

Global Indices: For the week, the major averages turned in a mixed performance. While the Dow inched up by 0.1 percent, the S&P 500 slipped by 0.2 percent and the Nasdaq fell by 0.4 percent.

Indian Economy: India's forex reserves dropped by USD 4.992 billion to USD 593.904 billion for the week ended September 8, the Reserve Bank of India reported. The foreign currency assets decreased by USD 4.265 billion to USD 526.426 billion, according to the Weekly Statistical Supplement released by the RBI. Gold reserves were down by USD 554 million to USD 44.384 billion, the RBI said. The country's reserve position with the IMF was also down by USD 39 million to USD 5.034 billion.

Equity Market: The barometer index, the S&P BSE Sensex advanced 319.63 points or 0.47% to 67,838.63. The Nifty 50 index added 89.25 points or 0.44% to 20,192.35.

Corporate News: Tata Steel and the UK government announced a joint agreement to invest in electric arc furnace steelmaking at the Port Talbot site with a capital cost of 1.25 billion euro inclusive of a grant from the UK Government of up to 500 million euro. Bharat Electronics (BEL) announced that it has received an order from Cochin Shipyard for supply of various equipment worth Rs 2,118.57 crore and additional orders worth Rs 886 crore for upgradation of missiles.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 83.0 | (72.6) | 169.3 |
| MF(INR cr) | 344.4 | 958.0 | 400.5 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 112,918 | 89,703 | 71,199 |
| F&O(INR cr) | 17,469,399 | 32,536,752 | 27,812,490 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 13.8 | 13.7 | 15.6 |
| NSE VIX | 10.9 | 11.1 | 11.6 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 46,232 | 0.5 % | 13.3 % | Energy | 27,338 | (0.3) % | 19.9 % |
| IT | 33,355 | 0.9 % | 16.5 % | Pharma | 15,584 | 0.6 % | 29.1 % |
| Metals | 7,036 | (0.2) % | 28.4 % | Finance | 20,531 | 0.6 % | 13.0 % |
| Auto | 16,426 | 1.6 % | 32.2 % | PSU | 5,046 | 0.5 % | 34.4 % |
| FMCG | 51,895 | (0.5) % | 13.5 % | Real Estate | 587 | (0.4) % | 50.2 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Bajaj Auto | 5,131 | 5.9 % | 28.5 % | Interglobe | 2,391 | (3.0) % | 25.9 % |
| ICICI Pru | 595 | 4.5 % | 35.9 % | I O C L | 92 | (2.9) % | 18.6 % |
| Zomato Ltd | 103 | 3.5 % | 98.2 % | B P C L | 352 | (1.8) % | 6.8 % |
| Havells In | 1,431 | 2.8 % | 20.4 % | GAIL (Indi | 124 | (1.6) % | 17.4 % |
| Muthoot Fi | 1,326 | 2.7 % | 35.1 % | United Spi | 1,049 | (1.5) % | 39.7 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|---------------------------|-------------|------------------|---------------|---------------|-----------------------|
| Housing Starts | 18-09-2023 | 17:45 | CAD | - | - |
| IPPI m/m | 18-09-2023 | 18:00 | CAD | - | 0.004 |
| Rightmove HPI m/m | 18-09-2023 | 04:31 | GBP | - | (0.019) |
| BusinessNZ Services Index | 18-09-2023 | 04:00 | NZD | - | 47.8 |
| NAHB Housing Market Index | 18-09-2023 | 19:30 | USD | - | 50 |

..... End of Report