



20 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,408	0.0 %	38.2 %
BSE SENSEX	38,615	0.2 %	35.9 %
CNX BANK	22,286	0.0 %	22.4 %
CNX MIDCAP	16,764	0.0 %	46.1 %
CNX SMALLCAP	5,565	0.0 %	57.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,693	(0.3) %	(3.0) %
S&P 500	3,375	(0.4) %	4.5 %
FTSE 100	6,112	0.6 %	(19.6) %
HANG SENG	25,179	(0.7) %	(11.8) %
NIKKEI	23,111	0.3 %	(0.4) %
SHANGHAI COMPOSITE	3,408	(1.2) %	10.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.50	(0.1) %	4.6 %
EUR/USD	1.19	0.6 %	6.2 %
GBP/USD	1.32	0.8 %	0.0 %
USD/JPY	105.52	(1.0) %	(2.9) %
USD/AUD	1.38	(0.9) %	(3.1) %
USD/SGD	1.37	(0.4) %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	0.1 %	(29.8) %
Gold(INR/10g)	53,185	(1.1) %	36.4 %
Gold Comex(USD/oz)	1,980	(0.7) %	28.4 %
SILVER(INR/1Kg)	66,444	(4.5) %	44.3 %
Aluminium(USD/MT)	1,747	0.8 %	(1.4) %
Copper(USD/MT)	6,667	2.7 %	8.1 %

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: Global goods trade saw record fall in the second quarter but a partial uptick in trade and output are expected in the third quarter, the World Trade Organization said Wednesday. The Goods Trade Barometer, a real-time gauge of trends in global trade, fell 18.6 point from last year to 84.5 in the second quarter, the lowest on record since the series began in 2007. All of the barometer's component indices remained well below trend, with many registering historic lows. The US Fed Federal Reserve released minutes of its July 28-29 meeting. Fed committee members expressed skepticism over using bond purchases to control the government bond yield curve. Officials "agreed that the ongoing public health crisis would weigh heavily on economic activity, employment, and inflation in the near term and was posing considerable risks to the economic outlook over the medium term. Eurozone inflation rose marginally in July, as initially estimated, final data from Eurostat revealed Wednesday. Inflation edged up to 0.4% from 0.3% in June. The rate matched the estimate released on July 31. Headline inflation continued to remain well below the European Central Bank's target of below, but close to 2%. UK consumer price inflation rose to 1% in July, on higher clothing and petrol prices, data from the Office for National Statistics showed Wednesday. This was the highest rate since March. Japan posted a merchandise trade surplus of 11.641 billion yen in July, the Ministry of Finance said on Wednesday, following the 268.8 billion yen shortfall in June. Exports slumped 19.2% on year, following the 26.2% drop in the previous month. Imports were down an annual 22.3% following the 14.4% slide a month earlier.

Global Equities: The Nasdaq and the S&P 500 reached new record intraday highs amid talks of US headed closer to reaching a new stimulus deal.

Indian Economy: Reserve Bank of India (RBI) has invited comments on the draft framework for recognition of a Self-Regulatory Organisation (SRO) for Payment System Operators. RBI noted that SRO shall cover operators in all segments of payment systems and will be expected to observe best practices on security, customer protection and competitiveness. The SRO shall serve as a two-way communication channel between the PSOs and Reserve Bank and work towards establishing minimum benchmarks and standards in the payments space, apart from helping disciplined behaviour by members. Ministry of Health and Family Welfare noted in an update that India is on the heels of crossing 3 crore cumulative COVID-19 tests and the total number of recoveries has crossed 2 million.

Equity Markets: Key equity barometers advanced for third straight session on Wednesday. Sentiment was boosted by hopes that the government will spend more to support economy. A rising recovery rate among Covid-19 patients in India also supported buying. PSU banks and media shares rallied. The barometer index, the S&P BSE Sensex rose 86.47 points or 0.22% at 38,614.79. The Nifty 50 index added 23.05 points or 0.2% at 11,408.40. Both these indices rose about 2% in three days.

Corporate News: L&T Finance Holdings said its board approved raising up to Rs 200 crore via non-convertible debentures. MOIL, Indian Overseas Bank, J Kumar Infraprojects, Accelya Solutions India, Sheela Foam will be in focus ahead of their quarterly earnings today. Dr Reddy's Laboratories launched antiviral drug Avigan (favipiravir) tablets, currently being manufactured by innovator Japanese drug giant Fujifilm Toyama Chemical Co, for the potential treatment of mild to moderate Covid-19 patients in India.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	140.5	447.8	114.9
MF(INR cr)	(569.6)	(521.6)	(181.5)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	60,011	62,541	56,300
F&O(INR cr)	1,589,922	1,758,108	1,568,592

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.5	22.7	31.3
NSE VIX	20.0	22.1	31.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,286	0.5 %	22.4 %	Energy	15,712	0.5 %	45.9 %
IT	18,211	(0.3) %	51.2 %	Pharma	11,538	(0.4) %	64.2 %
Metals	2,513	0.2 %	61.8 %	Finance	11,042	0.4 %	23.5 %
Auto	7,941	(0.0) %	70.5 %	PSU	1,462	2.4 %	14.0 %
FMCG	31,586	(0.4) %	19.8 %	Real Estate	220	1.3 %	28.0 %

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>
Zee Entert	197	13.1 %	62.8 %	ICICI Lomb	1,311	(1.9) %	18.5 %
GAIL (Indi	101	4.6 %	33.9 %	Siemens	1,224	(1.6) %	12.8 %
Punjab Nat	34	4.1 %	12.3 %	Bajaj Auto	3,060	(1.4) %	49.2 %
Power Fin.	97	3.5 %	9.0 %	Bosch	13,616	(1.4) %	47.4 %
General In	146	3.5 %	38.4 %	O N G C	80	(1.4) %	21.0 %

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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