



20 Sep.2023

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 20,133 | (0.3) % | 15.7 % |
| BSE SENSEX | 67,597 | (0.4) % | 14.4 % |
| CNX BANK | 45,980 | (0.5) % | 12.7 % |
| CNX MIDCAP | 40,658 | (0.4) % | 34.8 % |
| CNX SMALLCAP | 12,725 | (0.5) % | 40.4 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 34,518 | (0.3) % | 4.2 % |
| S&P 500 | 4,444 | (0.2) % | 16.2 % |
| FTSE 100 | 7,660 | 0.1 % | 1.4 % |
| HANG SENG | 17,997 | 0.4 % | (10.7) % |
| NIKKEI | 33,243 | (0.9) % | 29.3 % |
| SHANGHAI COMPOSITE | 3,125 | (0.0) % | 0.3 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 83.11 | 0.1 % | 0.5 % |
| EUR/USD | 1.07 | (0.4) % | (0.4) % |
| GBP/USD | 1.24 | (0.6) % | 2.4 % |
| USD/JPY | 147.86 | 0.4 % | 12.8 % |
| USD/AUD | 1.56 | 0.1 % | 6.0 % |
| USD/SGD | 1.36 | 0.2 % | 1.7 % |

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 global economy is projected to grow faster than expected this year as activity proved more resilient in the first half of the year but a sharper slowdown in China and elevated public debt are likely to weigh on next year growth, the Organization for Economic Co-operation and Development said Tuesday. The world economy would grow 3.0 percent this year, which was revised up from the 2.7 percent growth previously projected in June, the OECD said in its Interim Report. Further looking ahead, global growth is seen at 2.7 percent next year, but the rate was lowered from 2.9 percent. In most economies, inflation is forecast to moderate gradually over 2023 and 2024, but remain above central bank objectives, the report said. The Commerce Department released a report that showed U.S. housing starts plunged by 11.3 percent to an annual rate of 1.283 million in August. Meanwhile, building permits surged by 6.9 percent to an annual rate of 1.543 million in August. China kept benchmark lending rates unchanged at a monthly fixing on Wednesday, as fresh signs of economic stabilization and a weakening Yuan reduced the need for immediate monetary easing. The one-year loan prime rate (LPR) was kept at 3.45%, while the five-year LPR was unchanged at 4.20%. The euro area annual inflation rate was 5.2% in August 2023, down from 5.3% in July, data by Eurostat showed. Japan posted a merchandise trade deficit of 930.477 billion yen in August, the Ministry of Finance reported. Exports were down 0.8 percent on year at 7.994 trillion yen and imports slumped an annual 17.8 percent to 8.924 trillion yen.

Global Indices: The Dow fell 106.57 points or 0.3 percent to 34,517.73, the Nasdaq dipped 32.05 points or 0.2 percent to 13,678.19 and the S&P 500 slipped 9.58 points or 0.2 percent to 4,443.95.

Indian Economy: The pace of financial inclusion in India is ticking up at a substantial pace, according to latest data from the Reserve Bank of India or RBI. The value of Financial Inclusion Index (FI-Index) for March 2023 stands at 60.1 vis-à-vis 56.4 in March 2022, with growth witnessed across all sub-indices. Improvement in FI Index was mainly contributed by Usage and Quality dimensions, reflecting deepening of financial inclusion.

Equity Market: The barometer index, the S&P BSE Sensex declined 241.79 points or 0.36% to 67,596.84. The Nifty 50 index lost 59.05 points or 0.29% to 20,133.30.

Corporate News: Wipro has partnered with ServiceNow to create Wipro CyberTransform - Intelligent ServiceNow Risk and Security Solutions. The solution will enable organizations to integrate their risk, compliance, and security postures more quickly and effectively. Tata Motors will increase prices of its commercial vehicles up to 3%, effective October 1. The price increase is to offset the residual impact of the past input costs, and will be applicable across the entire range of commercial vehicles.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 36.2 | (62.7) | 168.1 |
| 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) | 5,400 | 82,678 | 70,627 |
| F&O(INR cr) | 30,619,471 | 32,376,979 | 27,836,898 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 13.8 | 13.7 | 15.6 |
| NSE VIX | 10.8 | 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 | 45,980 | (0.5) % | 12.7 % | Energy | 27,536 | 0.7 % | 20.7 % |
| IT | 33,130 | (0.7) % | 15.7 % | Pharma | 15,503 | (0.5) % | 28.5 % |
| Metals | 6,958 | (1.1) % | 27.0 % | Finance | 20,408 | (0.6) % | 12.4 % |
| Auto | 16,564 | 0.8 % | 33.3 % | PSU | 5,217 | 3.4 % | 38.9 % |
| FMCG | 52,199 | 0.6 % | 14.1 % | Real Estate | 579 | (1.4) % | 48.1 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Bank of Ba | 217 | 3.1 % | 28.5 % | FSN E-Comm | 149 | (2.9) % | 17.6 % |
| Bharat Ele | 140 | 3.1 % | 44.8 % | HDFC AMC | 2,649 | (2.8) % | 53.1 % |
| Power Grid | 200 | 3.1 % | 18.8 % | Cholaman.I | 1,194 | (2.7) % | 53.3 % |
| Berger Pai | 741 | 3.0 % | 27.9 % | Hindalco I | 485 | (2.4) % | 20.4 % |
| Titan Comp | 3,340 | 2.8 % | 31.6 % | SBI Cards | 820 | (2.3) % | 9.7 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|------------------------------|-------------|------------------|---------------|---------------|-----------------------|
| MI Leading Index m/m | 20-09-2023 | 06:00 | AUD | - | 0 |
| CB Leading Index m/m | 20-09-2023 | 20:00 | AUD | - | 0 |
| BOC Summary of Deliberations | 20-09-2023 | 23:00 | CAD | - | - |
| SECO Economic Forecasts | 20-09-2023 | 12:30 | CHF | - | - |
| 1-y Loan Prime Rate | 20-09-2023 | 06:45 | CNY | - | 0.0345 |
| German PPI m/m | 20-09-2023 | 11:30 | EUR | - | (0.011) |
| HPI y/y | 20-09-2023 | 14:00 | GBP | - | 0.017 |
| Trade Balance | 20-09-2023 | 05:20 | JPY | - | - |
| Current Account | 20-09-2023 | 04:15 | NZD | - | - |
| Federal Funds Rate | 20-09-2023 | 23:30 | USD | - | 0.055 |

..... End of Report