



21 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,312	0.0 %	37.1 %
BSE SENSEX	38,220	(1.0) %	35.8 %
CNX BANK	21,999	0.0 %	20.8 %
CNX MIDCAP	16,900	0.0 %	47.3 %
CNX SMALLCAP	5,602	0.0 %	58.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,740	0.2 %	(2.8) %
S&P 500	3,386	0.3 %	4.8 %
FTSE 100	6,013	(1.6) %	(20.9) %
HANG SENG	24,791	(1.5) %	(13.1) %
NIKKEI	22,881	(1.0) %	(1.4) %
SHANGHAI COMPOSITE	3,364	(1.3) %	9.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.64	0.0 %	4.8 %
EUR/USD	1.19	0.4 %	6.2 %
GBP/USD	1.32	0.7 %	0.1 %
USD/JPY	105.61	(0.6) %	(2.8) %
USD/AUD	1.38	(0.5) %	(3.1) %
USD/SGD	1.37	(0.2) %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	(0.8) %	(30.4) %
Gold(INR/10g)	52,317	(1.6) %	34.2 %
Gold Comex(USD/oz)	1,941	(2.0) %	25.8 %
SILVER(INR/1Kg)	65,671	(1.2) %	42.6 %
Aluminium(USD/MT)	1,756	0.5 %	(0.9) %
Copper(USD/MT)	6,595	(1.1) %	7.0 %

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) %	(1.3) %

Global Economy: Conference Board released a report on Thursday showing its leading economic index for the US increased for the third straight month in July, although the pace growth by the index slowed from the two previous months. The report said the leading economic index jumped by 1.4% in July after surging up by 3% in June and by 3.1% in May. The Philly Fed said its diffusion index for current activity dropped to 17.2 in August from 24.1 in July. First-time claims for US unemployment benefits increased in the week ended August 15th, according to a report released by the Labor Department. The report said initial jobless claims climbed to 1.106 million, an increase of 135,000 from the previous week's revised level of 971,000. Germany's producer prices dropped for the sixth straight month in July, Destatis reported Thursday. Producer prices declined 1.7% year-on-year in July, slightly slower than the 1.8% drop seen in June. On a monthly basis, producer prices gained 0.2% after remaining unchanged in June. Eurozone's construction output rose 4% in June from May, when it surged 29.4%, data from Eurostat showed on Thursday. June was a month marked by some relaxation of COVID-19 containment measures in many Member States, Eurostat said. Output started falling from February and logged double-digit declines in March and April when the economy was ravaged by the coronavirus, or Covid-19, pandemic.

Global Equities: Tech stocks continued to offer decent support to the US equities. European stocks fell on rising Covid-19 cases in Germany.

Indian Economy: The provisional payroll data published by EPFO revealed that the subscriber base of EPFO increased by around 8.47 lakh members during the first quarter of FY21. The COVID-19 pandemic outbreak had adversely affected the enrolments in the month of April and May 2020. The month of June has seen speedy recovery with addition of 6.55 lakh net subscribers registering a sharp 280% month on month growth. Under the 100% Emergency Credit Line Guarantee Scheme (ECLGS) backed by a Government of India guarantee, Banks from Public & Private Sectors have sanctioned loans worth over Rs. 1.5 lakh crore as of 18th August, 2020, of which more than Rs 1 lakh crore has already been disbursed. The ECLGS was announced by the Government as a part of Aatma Nirbhar Bharat Package, to mitigate the distress caused by lockdown due to COVID-19 by providing credit to different sectors, especially MSMEs.

Equity Markets: Key domestic indices corrected on Thursday, snapping a three-day rising streak as weak global cues triggered profit booking. Selling was prominent in banks and financial shares. The main indices were volatile due to expiry of weekly index options. The barometer index, the S&P BSE Sensex declined 394.40 points or 1.02% at 38,220.39. The Nifty 50 index lost 96.20 points or 0.84% at 11,312.20. Both these indices rose about 2% in the previous three sessions.

Corporate News: Wipro will be in focus as the company has set up blockchain-based gas trading platform for Uniper Global Commodities SE. Commercial vehicle manufacturers are expected to incur a massive net loss to the tune of Rs 6,000 crore in the current financial year, with the volume likely to touch its lowest point in a decade after two consecutive years of high de-growth, Ratings agency Crisil said. Hindalco Industries has entered into a memorandum of understanding (MoU) with cement major UltraTech Cement to deliver 1.2 million tonne of bauxite residue, annually to UltraTech's 14 plants across seven states. GMM Pfaudler signed definitive agreements to acquire a majority stake (54%) in the global business of the Pfaudler Group from Pfaudler UK.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	147.0	424.7	115.3
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)	60,106	62,367	56,340
F&O(INR cr)	3,498,360	1,882,412	1,588,693

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.7	22.7	31.2
NSE VIX	20.6	22.0	31.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,999	(1.3) %	20.8 %	Energy	15,961	1.6 %	48.2 %
IT	18,126	(0.5) %	50.5 %	Pharma	11,541	0.0 %	64.2 %
Metals	2,539	1.0 %	63.4 %	Finance	10,898	(1.3) %	21.9 %
Auto	7,912	(0.4) %	69.9 %	PSU	1,457	(0.4) %	13.6 %
FMCG	31,440	(0.5) %	19.3 %	Real Estate	221	0.4 %	28.6 %

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>
NHPC Ltd	24	12.7 %	21.1 %	Muthoot Fi	1,189	(5.3) %	96.7 %
Adani Tran	270	10.0 %	42.4 %	Motherson	119	(4.6) %	106.0 %
NTPC	101	6.8 %	24.8 %	Hindustan	223	(3.6) %	39.2 %
Power Fin.	102	4.7 %	14.2 %	ICICI Pru	439	(3.4) %	28.2 %
Indraprast	410	3.9 %	5.1 %	Tata Motor	122	(2.8) %	79.1 %

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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