



21 Sep.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,505	(0.1) %	39.4 %
BSE SENSEX	38,846	(0.3) %	37.4 %
CNX BANK	22,031	(1.3) %	21.0 %
CNX MIDCAP	17,399	(0.1) %	51.7 %
CNX SMALLCAP	5,992	(0.4) %	69.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,657	(0.9) %	(3.1) %
S&P 500	3,319	(1.1) %	2.7 %
FTSE 100	6,007	(0.7) %	(21.0) %
HANG SENG	24,455	0.5 %	(14.3) %
NIKKEI	23,360	0.2 %	0.7 %
SHANGHAI COMPOSITE	3,338	2.1 %	8.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.52	0.1 %	3.3 %
EUR/USD	1.18	(0.3) %	5.3 %
GBP/USD	1.29	0.0 %	(1.8) %
USD/JPY	104.82	(0.3) %	(3.5) %
USD/AUD	1.37	0.4 %	(3.8) %
USD/SGD	1.36	0.1 %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	2.4 %	(32.8) %
Gold(INR/10g)	51,619	0.2 %	32.4 %
Gold Comex(USD/oz)	1,959	0.2 %	27.0 %
SILVER(INR/1Kg)	65,454	0.9 %	42.1 %
Aluminium(USD/MT)	1,745	0.1 %	(1.5) %
Copper(USD/MT)	6,834	1.1 %	10.8 %

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 Conference Board showed a continued increase by its reading on leading US economic indicators in the month of August. The Conference Board said its leading economic index rose by 1.2% in August after surging up by 2% in July and surging by 3.1% in June. The University of Michigan released a report on Friday showing consumer sentiment continued to improve in the month of September. The preliminary report said the consumer sentiment index climbed to 78.9 in September from 74.1 in August. Euro area current account surplus declined in July due to a fall in primary income, the European Central Bank reported Friday. The current account surplus decreased to a seasonally adjusted EUR 17 billion from EUR 21 billion in June. In the same period last year, the surplus was EUR 24 billion. The surplus on goods trade rose to EUR 30 billion from EUR 25 billion a month ago and that on services climbed to EUR 5 billion from EUR 4 billion. UK retail sales rose for the fourth straight month in August surpassing the pre-pandemic level, data from the Office for National Statistics showed Friday. Retail sales volume increased 0.8% month-on-month in August, but slower than July's 3.7% increase. Japan overall nationwide consumer prices were up 0.2% on year in August, the Ministry of Internal Affairs and Communications said on Friday.

Global Equities: US stocks extended losses as tech counters saw further weakness.

Indian Economy: All-India Consumer Price Index (CPI) Numbers for Agricultural Labourers (AL) and Rural Labourers (RL) (Base: 1986-87=100) for the month of August, 2020 increased by 5 points each to stand at 1026 (One thousand and twenty six) and 1033 (One thousand and thirty three) points respectively. Point to point rate of inflation based on the CPI-AL and CPI-RL decreased to 6.32% and 6.28% in August, 2020 from 6.58% and 6.53% respectively in July, 2020. Inflation based on food index of CPI-AL and CPI-RL is at (+) 7.76% & (+) 7.83% respectively in August, 2020, noted the Ministry of Labour & Employment.

Equity Markets: The Sensex ended with modest losses while the Nifty ended almost flat after a volatile session on Friday. Heavy selling in banks eclipsed rally in pharma shares. Worries about a resurgence in coronavirus cases across the globe spooked investors.

Corporate News: Public sector banks (PSBs) reported frauds worth over Rs 19,964 crore in total 2,867 cases during the April-June quarter of the ongoing fiscal year, according to a reply to an RTI query. The country's largest lender State Bank of India (SBI) saw the highest number of fraud cases; however, Bank of India was the worst hit in terms of value. RITES: announced buyback of shares up to Rs 257 crore at a price of Rs 265 per share and has fixed September 30 as record date for the purpose of buyback. Metal and mining counters could be in focus as COMEX Copper soared to near two and half month high of \$3.10 per pound in last session.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(17.8)	43.3	104.1
MF(INR cr)	(393.4)	(471.3)	(219.1)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	89,503	59,022	56,089
F&O(INR cr)	1,324,093	2,131,459	1,670,347

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.8	28.2	30.4
NSE VIX	20.1	21.1	29.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,031	(1.3) %	21.0 %	Energy	15,777	0.6 %	46.5 %
IT	19,827	0.0 %	64.6 %	Pharma	12,321	5.0 %	75.3 %
Metals	2,362	(0.0) %	52.1 %	Finance	10,747	(1.2) %	20.2 %
Auto	8,162	0.4 %	75.2 %	PSU	1,387	(1.6) %	8.1 %
FMCG	30,461	(0.6) %	15.6 %	Real Estate	227	1.9 %	31.8 %

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	5,333	10.5 %	72.3 %	General In	129	(3.0) %	22.5 %
Cipla	806	7.3 %	94.9 %	HDFC Bank	1,057	(2.4) %	27.4 %
Lupin	1,086	4.7 %	87.5 %	Petronet L	228	(2.4) %	14.1 %
Divi's Lab	3,344	4.1 %	78.2 %	Bandhan Ba	299	(2.1) %	53.3 %
Cadila Hea	410	4.1 %	55.3 %	Kotak Mah.	1,277	(2.1) %	8.1 %

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					

..... End of Report