



24 Aug.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	16,531	0.2 %	11.2 %
BSE SENSEX	55,556	0.4 %	11.2 %
CNX BANK	35,144	0.1 %	3.8 %
CNX MIDCAP	27,105	0.8 %	12.4 %
CNX SMALLCAP	9,713	0.5 %	17.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,336	0.6 %	15.5 %
S&P 500	4,480	0.9 %	19.3 %
FTSE 100	7,109	0.3 %	8.2 %
HANG SENG	25,110	1.1 %	(8.6) %
NIKKEI	27,494	1.8 %	0.9 %
SHANGHAI COMPOSITE	3,477	1.5 %	(0.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.10	(0.1) %	1.6 %
EUR/USD	1.17	(0.4) %	(4.6) %
GBP/USD	1.36	(1.2) %	(0.3) %
USD/JPY	109.80	0.3 %	6.4 %
USD/AUD	1.40	2.1 %	8.1 %
USD/SGD	478.9035,110.5	%36,126.0	%

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	5.3 %	37.8 %
Gold(INR/10g)	47,199	0.3 %	(7.5) %
Gold Comex(USD/oz)	1,808	1.2 %	(7.2) %
SILVER(INR/1Kg)	62,688	1.0 %	(9.0) %
Aluminium(USD/MT)	2,609	1.6 %	29.6 %
Copper(USD/MT)	9,237	3.5 %	16.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.0 %	0.3 %

Global Economy: The US manufacturing sector continued to expand in August, albeit at a slower pace than it did in July, with IHS Markit's Manufacturing PMI dropping to 61.2 (preliminary) from 63.4. The US service-sector PMI reading dropped to 55.2, down from July's reading of 59.9. Eurozone private sector logged one of the strongest growth seen over the past two decades in August, flash survey results from IHS Markit showed on Monday. The flash composite output index declined to 59.5 from a 15-year high of 60.2 in the previous month. Euro area consumer confidence weakened for a second straight month in August, preliminary data from the European Commission showed Monday. The consumer confidence index dropped to -5.3 from -4.4 in July. German economy continued to grow strongly in August despite further constraints on manufacturing production, survey results from Markit showed Monday. The composite output index dropped to 60.6 from 62.4 in July. UK flash composite output index decreased to a six-month low of 55.3 in August from 59.2 in July, due to staff shortages and supply chain issues, survey results from IHS Markit and the Chartered Institute of Procurement & Supply showed on Monday. Weaker recoveries were seen in both the manufacturing and service sectors. Australia manufacturing sector continued to expand in August, with a 14-month low manufacturing PMI score of 51.7, the latest survey from Markit Economics showed.

Global Equities: The US stocks closed on a strong note with the DOW rising around 0.60% on the day. China reported zero locally transmitted COVID-19 cases August 22. Asian equities are mostly higher today.

Indian Economy: Finance Minister Nirmala Sitharaman launched a Rs 6-lakh-crore plan to monetize government's existing asset base and use the proceeds to boost infrastructure. Foreign direct investments into the country continued to rise, jumping to \$12.1 billion in May this year, Commerce and Industry Minister Piyush Goyal said on Monday. India has received the highest ever FDI inflow in 2020-21. It surged by 10% to \$81.72 billion and FDI during May 2021 is \$12.1 billion, around 203% higher than May 2020.

Equity Markets: The domestic equity benchmarks managed to close with decent gains after a volatile session on Monday. The Nifty closed just shy of the 16,500 mark. IT stocks climbed while auto and metal shares tumbled.

Corporate News: Crude oil linked counters will be in focus. The WTI Crude oil futures saw an awesome start to the week and jumped around 5% on the day on falling COVID-19 cases in China and expectations of a delay in tapering monetary support in the US. Maruti Suzuki India said that the CCI has passed an order on 23rd August, 2021 for the alleged contravention of Section 3 of the Competition Act, 2002 against the company in relation to implementing discount control policy vis-a-vis its dealers and has imposed a penalty for an amount of Rs 200 crores on the company. Eicher Motors said that the board of directors of the company has re-appointed Siddhartha Lal as Managing Director of the Company with effect from May 1, 2021 for a term of 5 years.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	69.5	83.7	1.5
MF(INR cr)	712.3	468.3	395.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	69,138	64,274	71,313
F&O(INR cr)	4,534,430	5,768,873	4,910,686

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.6	17.5	17.8
NSE VIX	13.7	13.1	16.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,124	0.3 %	3.7 %	Energy	19,332	(0.1) %	4.4 %
IT	33,920	1.7 %	30.6 %	Pharma	13,701	(0.1) %	10.7 %
Metals	5,291	(0.8) %	26.3 %	Finance	17,221	0.4 %	8.2 %
Auto	9,759	(1.5) %	(2.6) %	PSU	2,237	(0.5) %	1.0 %
FMCG	38,490	(0.3) %	10.4 %	Real Estate	370	(1.0) %	10.1 %

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>
Adani Tran	1,180	5.0 %	18.1 %	Biocon	333	(6.8) %	(18.8) %
HCL Techno	1,163	4.1 %	16.0 %	Jubilant F	3,791	(4.5) %	28.5 %
L & T Info	5,053	2.7 %	22.9 %	Bandhan Ba	267	(4.1) %	(24.0) %
Nestle Ind	20,021	2.3 %	17.2 %	Piramal En	2,552	(3.2) %	43.4 %
Cadila Hea	547	2.3 %	23.8 %	Yes Bank	11	(3.1) %	(31.2) %

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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