



25 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,466	0.0 %	38.9 %
BSE SENSEX	38,799	0.9 %	37.9 %
CNX BANK	22,833	0.0 %	25.4 %
CNX MIDCAP	17,101	0.0 %	49.1 %
CNX SMALLCAP	5,754	0.0 %	62.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,308	1.4 %	(0.8) %
S&P 500	3,431	1.0 %	6.2 %
FTSE 100	6,105	1.7 %	(19.7) %
HANG SENG	25,552	1.7 %	(10.5) %
NIKKEI	22,986	0.3 %	(0.9) %
SHANGHAI COMPOSITE	3,386	0.2 %	9.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.74	0.1 %	5.0 %
EUR/USD	1.18	(1.0) %	5.2 %
GBP/USD	1.31	(0.8) %	(0.7) %
USD/JPY	105.83	0.2 %	(2.6) %
USD/AUD	1.40	1.1 %	(2.0) %
USD/SGD	1.37	0.4 %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	0.7 %	(30.3) %
Gold(INR/10g)	52,024	0.4 %	33.4 %
Gold Comex(USD/oz)	1,928	(0.7) %	25.0 %
SILVER(INR/1Kg)	65,333	(0.5) %	41.9 %
Aluminium(USD/MT)	1,736	0.8 %	(2.1) %
Copper(USD/MT)	6,580	0.2 %	6.7 %

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: According to the August 2020 National Association for Business Economics or NABE Economic Policy Survey, four in five panelists surveyed by said they see at least a 25% chance of the coronavirus fuelling a second economic downturn, or a "double-dip" recession. Nearly two-thirds of the National Association for Business Economics members who participated in the August 2020. NABE Economic Policy Survey believe the US economy continues to be in a recession that began last February. Almost half of the respondents expects inflation-adjusted gross domestic product to remain below its fourth-quarter 2019 level until the second half of 2022 or later. The panel is split in its view on Congress's fiscal response to the recession, with 40% calling the response insufficient, 37% indicating the response is adequate, and 11% saying it is excessive. Taiwan's industrial production rose at a softer pace in July and the unemployment rate fell marginally during the month, official figures showed on Monday. Industrial production rose 2.65% year-on-year in July, after a 7.19% increase in June. Singapore's consumer prices decreased at a softer rate in July, defying expectations for a worsening, data from the Monetary Authority of Singapore and the Ministry of Trade and Industry revealed on Monday. The consumer price index fell 0.4% year-on-year in July, following a 0.5% decrease in June.

Global Equities: US stocks surged on positive coronavirus vaccine updates. Tech stocks continued to see excellent buying.

Indian Economy: The Finance Ministry tweeted that businesses with an annual turnover of up to Rs 40 lakh are Goods and Services Tax (GST) exempt. Initially, this limit was Rs 20 lakh. Additionally, those with a turnover up to Rs 1.5 crore can opt for the Composition Scheme and pay only 1% tax. GST, which subsumed about 17 local levies, was rolled out on July 1, 2017. Ministry of Finance stated today that for smaller taxpayers with an annual turnover of up to Rs 5 cr, the rate of interest for late filing of GSTR-3B returns halved to 9% if filed by September 30, 2020. Ministry of Road Transport and Highways (MORTH) has decided to extend the validity of Fitness, Permits, Licenses, Registration or other documents under Motor Vehicles Act, 1988 and Central Motor Vehicle Rules, 1989 till the 30th of December 2020.

Equity Markets: Key domestic equity barometers ended with strong gains on Monday, buoyed by firmness in private banks stocks. Upbeat global cues boosted investor sentiment. The barometer index, the S&P BSE Sensex, advanced 364.36 points or 0.95% at 38,799.08. The Nifty 50 index climbed 94.85 points or 0.83% at 11,466.45.

Corporate News: IT counters could be under pressure as the Indian Rupee saw a massive uptick on surge in local equities. INR closed at 74.32 per US dollar, adding 52 paise on the day and hitting five month high. State-owned Oil and Natural Gas Corporation said its board will meet on September 1 to consider raising funds of up to Rs 45,000 crore. Atul Auto, Can Fin Homes, IRCON International, Phillips Carbon Black, Ruchira Papers will be in focus ahead of latest earnings today. Wipro announced a partnership with a standard initial margin model (SIMM) vendor, Quaternion Risk Management to offer SIMM-in-a-box to financial institutions covered under uncleared margin rules (UMR).



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	58.5	370.5	113.3
MF(INR cr)	(54.8)	(460.7)	(186.1)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	61,123	62,120	56,424
F&O(INR cr)	1,331,391	1,785,666	1,578,892

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.4	22.7	31.1
NSE VIX	19.2	21.7	31.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,833	2.4 %	25.4 %	Energy	16,071	(0.1) %	49.2 %
IT	18,011	(0.3) %	49.5 %	Pharma	11,572	(0.4) %	64.7 %
Metals	2,526	0.1 %	62.6 %	Finance	11,257	2.1 %	25.9 %
Auto	7,948	0.2 %	70.7 %	PSU	1,487	0.2 %	15.9 %
FMCG	31,642	0.1 %	20.0 %	Real Estate	222	(1.0) %	28.9 %

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	287	5.5 %	51.6 %	Power Fin.	98	(3.1) %	10.2 %
Zee Entert	202	5.0 %	66.7 %	DLF	158	(2.5) %	19.0 %
General In	152	4.4 %	44.3 %	NHPC Ltd	23	(2.2) %	17.0 %
Kotak Mah.	1,387	3.6 %	17.4 %	Power Grid	185	(2.0) %	19.8 %
HDFC AMC	2,476	3.2 %	13.3 %	Adani Port	349	(1.5) %	42.6 %

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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