



26 Aug.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,513	0.4 %	39.5 %
BSE SENSEX	38,844	0.1 %	37.7 %
CNX BANK	23,176	0.4 %	27.3 %
CNX MIDCAP	17,243	0.5 %	50.3 %
CNX SMALLCAP	5,826	0.7 %	64.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,248	(0.2) %	(1.0) %
S&P 500	3,444	0.4 %	6.6 %
FTSE 100	6,037	(1.1) %	(20.6) %
HANG SENG	25,486	(0.3) %	(10.7) %
NIKKEI	23,297	1.4 %	0.4 %
SHANGHAI COMPOSITE	3,374	(0.4) %	9.3 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.25	(0.8) %	4.3 %
EUR/USD	1.18	(0.3) %	5.3 %
GBP/USD	1.31	(0.4) %	(0.7) %
USD/JPY	105.86	(0.1) %	(2.6) %
USD/AUD	1.39	0.0 %	(2.2) %
USD/SGD	1.37	0.1 %	1.8 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	1.7 %	(29.1) %
Gold(INR/10g)	51,440	(1.1) %	31.9 %
Gold Comex(USD/oz)	1,929	0.1 %	25.0 %
SILVER(INR/1Kg)	64,185	(1.8) %	39.4 %
Aluminium(USD/MT)	1,733	(0.1) %	(2.2) %
Copper(USD/MT)	6,545	(0.5) %	6.1 %

## 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 consumer confidence unexpectedly declined for the second straight month in August. The Conference Board said its consumer confidence index slumped to 84.8 in August after tumbling to a downwardly revised 91.7 in July. New home sales in the US spiked by 13.9% to an annual rate of 901,000 in July after soaring by 15.1% to a rate of 791,000 in June. Germany's economy contracted less than initially estimated in the second quarter but the pace of decline was the biggest on record amid coronavirus pandemic, revised quarterly national accounts from Destatis showed Tuesday. Gross domestic product fell 9.7% sequentially after shrinking 2% in the first quarter. The rate was revised down from -10.1% estimated on July 30. German business confidence improved in August, survey data from IFO Institute showed Tuesday. The business confidence index rose to 92.6 in August from 90.4 in July. This was the fourth consecutive rise for the index. Companies assessed their current business situation more positively than last month. UK retail sales declined in August despite easing of lockdown measures, survey data from the Confederation of British Industry showed Tuesday. The retail sales balance fell to -6% from +4% in July. A net 17% forecast sales to fall further next month, Distributive Trades Survey revealed. At -45%, the retail employment fell at the fastest rate since February 2009 in the year to August, with an even sharper decline anticipated in the year to September. South Korea's consumer confidence improved for the fourth straight month in August, survey results from Bank of Korea showed. The consumer confidence index edged up to 88.2 in August from 84.2 in July.

**Global Equities:** US stocks saw some corrective action. Buying was limited as investors eyed Fed Chairman Jerome Powell's speech on Thursday during a virtual version of the Fed's annual Jackson Hole conference.

**Indian Economy:** The Reserve Bank Of India (RBI) in its latest annual report stated that high frequency indicators that have arrived so far point to a retrenchment in activity that is unprecedented in history. Moreover, the upticks that became visible in May and June after the lockdown was eased in several parts of the country, appear to have lost strength in July and August, mainly due to reimposition or stricter imposition of lockdowns, suggesting that contraction in economic activity will likely prolong into Q2. An assessment of aggregate demand during the year so far suggests that the shock to consumption is severe, and it will take quite some time to mend and regain the pre-COVID-19 momentum. RBI noted that in the case of state finances, space is likely to be squeezed so much that cuts in growth-giving capital expenditure seem quite probable. India's Crude oil production during July, 2020 was 2633.59 TMT which is 4.94% lower than target and 4.89% lower when compared with July 2019. Cumulative crude oil production during April-July, 2020 was 10308.78 TMT which is 3.53% and 6.08% lower than target for the period and production during corresponding period of last year respectively.

**Equity Markets:** Domestic equity barometers endured significant volatility and ended with minor gains on Tuesday. Positive global cues boosted sentiment. However, gains were capped due to profit selling after recent steep rise.

**Corporate News:** State Bank of India will be in focus as Moody's Investors Service has downgraded State Bank of India's standalone profile to ba2 from ba1 saying it sees the bank's asset quality and profitability deteriorating. IRCON International's Q1 consolidated revenue came in at Rs 526.87 crore against Rs 1,069.85 crore YoY. Net profit was Rs 34.46 crore against Rs 144.66 crore YoY. Kalpataru Power Transmission said its Subsidiary JMC Projects secured new orders worth Rs 554 crore.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	142.0	356.2	113.6
MF(INR cr)	35.4	(442.6)	(185.9)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	66,173	62,359	56,523
F&O(INR cr)	1,751,532	1,783,658	1,580,636

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.0	22.6	31.0
NSE VIX	19.3	21.5	31.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,092	1.1 %	26.8 %	Energy	15,980	(0.6) %	48.4 %
IT	17,974	(0.2) %	49.2 %	Pharma	11,500	(0.6) %	63.7 %
Metals	2,508	(0.7) %	61.4 %	Finance	11,359	0.9 %	27.0 %
Auto	7,984	0.4 %	71.4 %	PSU	1,507	1.3 %	17.4 %
FMCG	31,460	(0.6) %	19.4 %	Real Estate	217	(2.1) %	26.1 %

### 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>
Tata Motor	127	4.9 %	87.0 %	NHPC Ltd	22	(2.2) %	14.4 %
Bajaj Fina	3,643	4.3 %	64.1 %	Page Indus	20,393	(2.2) %	22.7 %
Avenue Sup	2,341	4.0 %	12.4 %	GAIL (Indi	100	(1.9) %	31.6 %
Havells In	663	4.0 %	36.8 %	Shree Ceme	21,811	(1.8) %	31.8 %
St Bk of I	208	3.2 %	11.5 %	Cadila Hea	388	(1.7) %	47.1 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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