



26 Aug.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	16,628	(0.0) %	11.8 %
BSE SENSEX	55,944	(0.0) %	11.9 %
CNX BANK	35,486	(0.3) %	4.8 %
CNX MIDCAP	27,459	0.4 %	13.9 %
CNX SMALLCAP	9,964	0.2 %	20.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,406	0.1 %	15.7 %
S&P 500	4,496	0.2 %	19.7 %
FTSE 100	7,150	0.3 %	8.8 %
HANG SENG	25,694	(0.1) %	(6.5) %
NIKKEI	27,725	(0.0) %	1.7 %
SHANGHAI COMPOSITE	3,540	0.7 %	1.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.02	(0.1) %	1.5 %
EUR/USD	1.17	0.4 %	(4.2) %
GBP/USD	1.37	0.8 %	0.5 %
USD/JPY	109.71	(0.1) %	6.3 %
USD/AUD	1.38	(1.5) %	6.5 %
USD/SGD	1.36	(99.7) %	2.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	1.2 %	43.6 %
Gold(INR/10g)	47,287	(0.5) %	(7.3) %
Gold Comex(USD/oz)	1,805	0.0 %	(7.4) %
SILVER(INR/1Kg)	63,457	0.3 %	(7.8) %
Aluminium(USD/MT)	2,648	(0.0) %	31.5 %
Copper(USD/MT)	9,379	0.7 %	18.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.0 %	0.4 %

Global Economy: US durable goods orders edged down by 0.1% in July following a 0.8% increase in June, the Commerce Department reported on Wednesday. The dip in durable goods orders came as orders for transportation equipment tumbled by 2.2% in July after jumping by 1.4% in the previous month. Orders for non-defence aircraft and parts led the way lower, plummeting by 48.9% in July after surging by 4.7% in June. Germany's leading indicator showed a loss of momentum in the German economy. The Ifo index dropped for the second month in a row in August and came in at 99.4. While the current assessment component improved to the highest level since June 2019, expectations saw their sharpest drop since the start of the pandemic. Japan's leading index, which measures the future economic activity, rose to 104.1 in June from 102.6 in May, as initially estimated, final data from the Cabinet Office showed on Wednesday. The coincident index increased to 94.5 in June from 92.1 in the previous month. In the initial estimate, the reading was 94.0. The lagging index grew to 94.5 in June from 92.1 in the prior month. According to the initial estimate, the reading was 96.5.

Global Equities: The US stocks closed higher on Wednesday, extending recent uptrend on continued optimism about growth.

Indian Economy: Finance Minister Nirmala Sitharaman stated that collectively all banks are performing well, they have come out of Prompt Corrective Action. They are showing clear profits. Finance Minister launched the EASE 4.0 Index - a reform agenda for 2021-22 for public sector banks (PSBs). Banks have shown that now they can raise money for their capital requirements. She noted that from inputs given by officers from Tax administration, it emerged that Banks need to understand the special requirements of Sunrise sector. e.g. Fintech, one such sector can provide technological help to banks as well as can benefit from help from banking sector. Banks can play a crucial role by hand-holding industries from a particular sector to enable them to become an exporter and thereby play an important role in assisting One district one Product scheme suggested by Prime Minister.

Equity Markets: After hitting record high levels in intraday trade, the benchmark indices sharply pared gains and ended flat on Wednesday. The Nifty closed below the 16,650 mark. FMCG shares advanced along with IT and metal stocks.

Corporate News: Bharti Airtel said that the meeting of the board of directors of the company is scheduled on 29 August 2021, to consider and approve various capital raising options through equity or equity linked or debt instruments or any combination there-of, as the Board may deem appropriate. Infosys announced that it will establish a new digital development centre at its largest Canadian office in Mississauga. This is aimed at creating 500 high quality jobs in the Toronto Region over the next three years. Procter & Gamble Hygiene and Health Care reported sales of Rs 787 crores, up 24% vs year ago behind market recovery and its superiority strategy. Profit After Tax (PAT) was Rs 49 crores, down 29% vs a year ago behind increased investment in brand building initiatives to accelerate growth.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(4.1)	60.1	(0.5)
MF(INR cr)	1,768.3	556.2	431.5

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	58,789	60,180	70,492
F&O(INR cr)	6,027,206	5,745,568	4,924,021

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.2	17.4	17.8
NSE VIX	13.5	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	35,586	(0.4) %	5.1 %	Energy	19,757	1.0 %	6.7 %
IT	34,084	0.7 %	31.2 %	Pharma	13,831	(0.3) %	11.7 %
Metals	5,474	0.5 %	30.7 %	Finance	17,404	(0.3) %	9.4 %
Auto	9,809	(0.2) %	(2.1) %	PSU	2,277	(0.0) %	2.8 %
FMCG	38,448	0.6 %	10.2 %	Real Estate	374	(0.8) %	11.2 %

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	1,300	5.0 %	30.1 %	Havells In	1,204	(4.9) %	13.8 %
Adani Gree	997	5.0 %	(14.0) %	Bajaj Fins	15,904	(3.4) %	62.5 %
Adani Port	721	3.6 %	(2.1) %	Titan Comp	1,823	(2.5) %	16.9 %
SBI Cards	1,065	3.6 %	9.3 %	DLF	307	(2.5) %	5.3 %
Jubilant F	3,828	3.5 %	29.7 %	ICICI Pru	655	(2.0) %	47.5 %

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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