



27 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,550	0.0 %	39.9 %
BSE SENSEX	39,074	0.6 %	38.2 %
CNX BANK	23,414	0.0 %	28.6 %
CNX MIDCAP	17,249	0.0 %	50.4 %
CNX SMALLCAP	5,847	0.0 %	65.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,332	0.3 %	(0.7) %
S&P 500	3,479	1.0 %	7.7 %
FTSE 100	6,046	0.1 %	(20.5) %
HANG SENG	25,492	0.0 %	(10.7) %
NIKKEI	23,291	(0.0) %	0.4 %
SHANGHAI COMPOSITE	3,330	(1.3) %	7.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.08	(0.9) %	4.1 %
EUR/USD	1.18	0.2 %	5.4 %
GBP/USD	1.31	0.2 %	(0.5) %
USD/JPY	106.27	0.4 %	(2.2) %
USD/AUD	1.39	(0.3) %	(2.3) %
USD/SGD	1.37	(0.2) %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	0.0 %	(29.1) %
Gold(INR/10g)	51,018	(0.8) %	30.8 %
Gold Comex(USD/oz)	1,927	(0.1) %	24.9 %
SILVER(INR/1Kg)	62,783	(2.2) %	36.3 %
Aluminium(USD/MT)	1,737	0.2 %	(2.0) %
Copper(USD/MT)	6,631	1.3 %	7.5 %

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: Reflecting a sharp increase in orders for transportation equipment, the Commerce Department released a report on Wednesday showing new orders for U.S. manufactured durable goods spiked in July. The Commerce Department said durable goods orders jumped by 11.2% in July after surging up by a revised 7.7% in June. French consumer confidence remained stable in August, survey data from the statistical office Insee showed Wednesday. The consumer sentiment index held steady at 94.0 in August. Japan's leading index increased in June, data the Cabinet Office showed on Wednesday. The leading index, which measures the future economic activity, rose to 84.4 in June from 78.3 in May. In the initial estimate, the reading was 85.0. The coincident index increased to 76.6 in June from 72.9 in the previous month. According to the initial estimate, the reading was 76.4. The lagging index rose to 93.4 in June versus 93.3 in the initial estimate. In May, the reading was 92.5. Japan's services producer price inflation accelerated in July, data from the Bank of Japan showed Wednesday. The corporate services producer price index advanced 1.2% on a yearly basis in July, faster than the 0.9% increase seen in June. This was the highest rate in four months.

Global Equities: US stocks stayed supported. The S&P 500 and Nasdaq hit record highs yet again on signs of strength in the pace of the economic recovery.

Indian Economy: India received 24% above average rains so far in August, a latest update from India Meteorological Department (IMD) noted, according to media reports. Of the 36 meteorological subdivisions in India, monsoon rains have been either average or above average in 32 so far this year. India, where nearly half of the country's farmland lacks irrigation, has received 7% above average rains since June 1. Ministry of Petroleum and Natural Gas noted in a latest update that Oil & Gas industry has kick-started economic activities/projects, numbering 8,363 with an anticipated cost of Rs 5.88 lakh crore which resumed progressively. In FY 2020-21, a total of around Rs 1.62 lakh crore (CAPEX and employment oriented OPEX) is targeted to be spent by Oil & Gas companies that has potential to generate employment of around 24 crore man-days (direct/indirect).

Equity Markets: The benchmark indices ended with decent gains on Wednesday. The Nifty managed to close above the 11,550 mark. The bourses witnessed bouts of volatility ahead of monthly F&O expiry due tomorrow. After struggling between gains and losses for most of the session, the indices firmed up once again and surged to end near the day's high today.

Corporate News: Vedanta Limited has appealed against the Madras High Court order refusing to allow reopening of Sterlite Copper plant in Thoothikudi, Tamil Nadu. Jindal Stainless said its board has approved raising funds up to Rs 162.80 crore through the issue of convertible equity warrants on a preferential basis. Hindustan Aeronautic will be in focus as the government will sell up to 15 percent stake in the stock via an offer for sale (OFS). The floor price for the offer has been fixed at Rs 1,001 per equity share.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	235.7	349.2	114.8
MF(INR cr)	28.2	(408.6)	(182.7)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	67,706	62,656	56,636
F&O(INR cr)	1,847,582	1,787,209	1,583,306

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.3	22.7	30.9
NSE VIX	19.3	21.4	31.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,414	1.4 %	28.6 %	Energy	16,115	0.8 %	49.6 %
IT	18,128	0.9 %	50.5 %	Pharma	11,485	(0.1) %	63.4 %
Metals	2,528	0.8 %	62.7 %	Finance	11,417	0.5 %	27.7 %
Auto	8,101	1.5 %	73.9 %	PSU	1,511	0.3 %	17.8 %
FMCG	31,408	(0.2) %	19.2 %	Real Estate	219	0.8 %	27.1 %

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	138	8.5 %	102.9 %	Adani Tran	283	(4.4) %	49.5 %
Hero Motoc	3,161	6.4 %	92.8 %	Bharti Air	515	(2.7) %	22.1 %
IndusInd B	568	5.8 %	65.9 %	UltraTech	4,080	(2.2) %	29.9 %
Zee Entert	212	5.8 %	74.9 %	Havells In	650	(2.0) %	34.0 %
Shriram Tr	726	4.5 %	19.5 %	Torrent Ph	2,755	(1.8) %	40.6 %

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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