



31 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,648	0.8 %	41.1 %
BSE SENSEX	39,467	0.9 %	39.6 %
CNX BANK	24,524	3.9 %	34.7 %
CNX MIDCAP	17,369	0.6 %	51.4 %
CNX SMALLCAP	5,867	(0.2) %	65.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,654	0.5 %	0.4 %
S&P 500	3,508	0.7 %	8.6 %
FTSE 100	5,964	(0.6) %	(21.6) %
HANG SENG	25,422	0.6 %	(10.9) %
NIKKEI	22,883	(1.4) %	(1.4) %
SHANGHAI COMPOSITE	3,404	1.6 %	10.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.81	(0.4) %	3.7 %
EUR/USD	1.18	0.0 %	5.4 %
GBP/USD	1.32	0.3 %	0.2 %
USD/JPY	106.24	0.0 %	(2.2) %
USD/AUD	1.38	(0.5) %	(3.2) %
USD/SGD	1.37	(0.1) %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	43	(0.2) %	(29.8) %
Gold(INR/10g)	50,981	(0.5) %	30.7 %
Gold Comex(USD/oz)	1,949	0.0 %	26.3 %
SILVER(INR/1Kg)	64,613	(0.8) %	40.3 %
Aluminium(USD/MT)	1,762	35.5 %	(0.6) %
Copper(USD/MT)	6,728	1.9 %	9.1 %

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: Consumer sentiment in the US improved by more than initially estimated in the month of August, according to revised data released by the University of Michigan. The report said the consumer sentiment index for August was upwardly revised to 74.1 from the preliminary reading of 72.8. The index is now well above the July reading of 72.5. A report released by MNI Indicators showed a modest decrease by its reading on Chicago-area business activity in the month of August, although the Chicago business barometer still pointed to growth. MNI Indicators said its Chicago business barometer slipped to 51.2 in August from 51.9 in July, but a reading above 50 still indicates growth in Chicago-area business activity. However, the Chicago business barometer came in above 50 for the second straight month after having sat below it for a full year. Germany's consumer confidence is set to weaken in September after three months of improvement, and defied expectations for a strong gain as income expectations deteriorated, survey data from the market researcher GfK showed on Friday. The forward-looking consumer confidence index for September dropped to -1.8 from -0.2 in August, which was revised from -0.3.

Global Equities: US stocks extended the upward move with the Nasdaq and the S&P 500 hitting new record closing highs, and the Dow ended the day at its best closing level in around 6 months.

Indian Economy: According to latest Agri Ministry data, as on 28.08.2020, the total Kharif crops has been sown on 1082.22 lakh ha area against 1009.98 lakh hectare (ha) area during the corresponding period of last year, thus, increasing by 7.15% compared to corresponding period of last year in the country. The Scheduled commercial banks (SCBs) credit growth eased on sequential basis to 5.5% YoY to Rs 10219729 crore as on 14 August 2020, compared with 5.7% growth a fortnight ago. The credit growth has also decelerated from 10.2% at end July 2019. Non-food credit, accounting for 99.3% of the share of the total credit, recorded a growth of 5.5%, YoY, at Rs 10146647 crore as on 14 August 2020 as against a rise of 5.6% fortnight ago and 10.1% rise a year ago.

Equity Markets: Domestic equity benchmarks ended with significant gains on Friday after the US Federal Reserve said it might keep interest rates low even if inflation rises, in a major overhaul to its strategy. The Nifty managed to close above the 11,650 mark.

Corporate News: The Central Board of Direct Taxes (CBDT) asked banks to return to customers and merchants any fees levied for making Unified Payment Interface (UPI) transactions in 2020, adding that such charges violate the law. Reliance Industries will be in focus as Reliance Retail acquired retail & wholesale and the logistics & warehousing business of the Future Group for Rs 24,713 crore. IRB Infrastructure Developers will be in focus ratings agency CRISIL cut company's long term rating to A from A+. Metal counters will be in focus as COMEX Copper hit around a two year high.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	192.7	334.3	116.7
MF(INR cr)	(413.0)	(409.3)	(185.1)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	4,299	59,934	56,216
F&O(INR cr)	1,402,336	1,854,057	1,600,411

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.0	22.8	30.8
NSE VIX	18.4	21.1	31.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,524	3.9 %	34.7 %	Energy	15,971	(0.2) %	48.3 %
IT	18,122	0.1 %	50.4 %	Pharma	11,623	0.3 %	65.4 %
Metals	2,520	(0.4) %	62.2 %	Finance	11,720	2.1 %	31.1 %
Auto	8,112	(0.9) %	74.2 %	PSU	1,602	4.9 %	24.8 %
FMCG	31,253	(0.2) %	18.6 %	Real Estate	233	0.1 %	35.4 %

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>
NMDC	108	11.9 %	36.9 %	Hindustan	229	(3.6) %	42.5 %
IndusInd B	666	9.9 %	94.5 %	JSW Steel	281	(3.0) %	96.3 %
Axis Bank	509	7.6 %	42.0 %	Hero Motoc	3,059	(2.6) %	86.6 %
Shriram Tr	773	7.3 %	27.1 %	Avenue Sup	2,319	(2.6) %	11.4 %
Bank of Ba	52	6.0 %	0.7 %	Bajaj Hold	2,782	(2.4) %	58.6 %

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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