

Equity Market

- ❖ Sensex falls 477 points from the day's high to end 25 points lower at 37,663
- ❖ Index VIX declines 1.29% to 23.57
- ❖ Nifty P/E at 30.41, Nifty Midcap 100 P/E at 123.10

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	% chg	52 wk high	52 wk low
Nifty50	11101.7	0.06	12430.5	7511.1
Nifty Mid cap 100	15725.7	0.55	18495.9	10750.0
Nifty Small cap 100	5189.5	1.13	6401.1	3202.9
Bank	21510.0	0.09	32613.1	16116.3
Auto	7489.1	1.84	8501.2	4452.2
FMCG	30863.6	-0.12	32644.9	22699.1
Pharma	11263.8	-0.47	10497.2	6242.9
Realty	202.4	0.07	336.4	160.9

Factors driving the market

- ❖ Markets wiped off early gains as caution ahead of RBI policy outcome
- ❖ Metal stocks shine, SAIL jumped 6.4% after its July sales rose 50%
- ❖ Info Edge shares gain 7%, hit all-time high on launch of QIP

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
Hindalco	177.1	221.2	84.9
Tata Steel	397.2	506.0	250.9
Eicher Motors	22029.0	23450.0	12450.1
Top Losers			
HDFC Life	605.1	647.6	340.0
UPL	455.0	617.8	240.2
Wipro	278.1	290.8	159.4

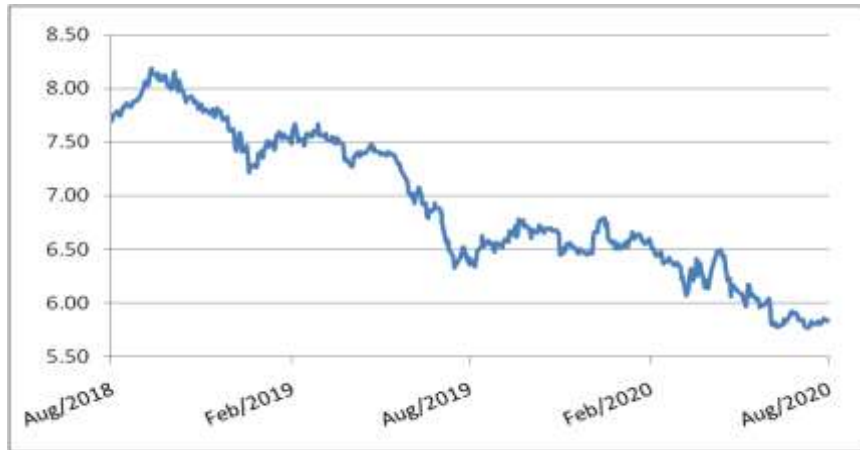
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
05-Aug-20	5450.8	4575.0	875.8
04-Aug-20	13432.5	5908.4	7524.1
03-Aug-20	4818.6	5734.0	(915.4)
Total Jul-2020	119628.6	112065.9	7562.7
Total Jun-2020	170846.4	149014.5	21831.6
Total 2019	1437559.6	1336438.9	101120.8

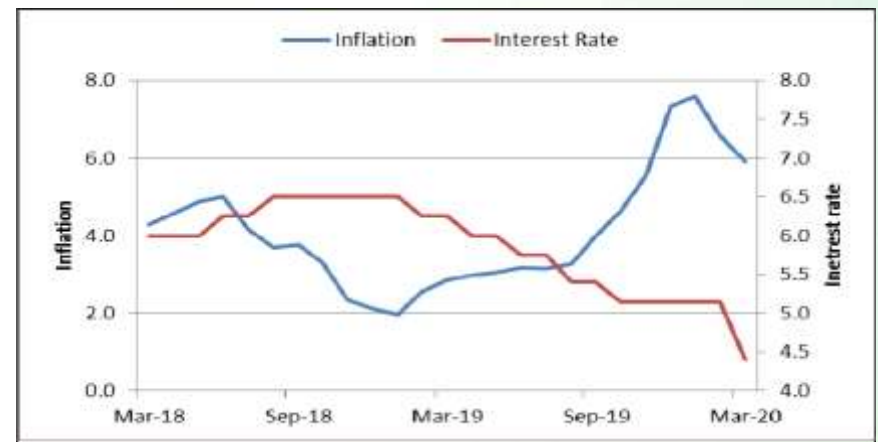
Debt Market

- ❖ Moratorium extension will lead to debt pile-up: Sunil Mehta, CEO, IBA
- ❖ Godrej Properties raises Rs 1,000 crore via debentures issue
- ❖ Indian pharma industry expected to be stable this year, says ICRA
- ❖ SBI economists pitch for sector-specific loan recast after moratorium ends
- ❖ HPCL issues NCD worth Rs 1,200cr on private placement

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	3.05
Repo rate	4.00
10 Yr Gsec yield	5.83
1-mth CP rate	3.42
3-mth CP rate	3.45
6-mth CP rate	3.97
1 Yr CP rate	4.10
1-mth CD rate	3.22
3-mth CD rate	3.38
6-mth CD rate	3.52
1 Yr CD rate	3.92

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Aug-06	G-sec auction	--
Aug-06	Total repo	--
Aug-06	Total reverse repo	7,04,707
Aug-06	Marginal standing facility	45
Aug-06	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
05-Aug-20	1211.7	1089.4	122.4
04-Aug-20	35.0	243.0	(208.0)
03-Aug-20	804.7	185.1	619.6
Total Jul-2020	26380.0	28856.4	(2476.4)
Total Jun-2020	21934.6	23479.5	(1545.0)
Total 2019	392458.9	366578.5	25880.4

Debt Fund Benchmark Indices

Market Indices	1 M (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)
Crisil Composite Bond Fund Index	1.19	12.24	8.59	9.50
Crisil Short Term Bond Fund Index	0.86	11.06	8.39	8.61
Crisil ST Debt Hybrid 75+25 Index	1.80	10.70	7.69	8.51
Crisil Liquid Fund Index	0.31	5.50	6.71	6.95

Macro

- ❖ Consultants likely to scrutinise government tenders and track Make-in-India: DPIIT
- ❖ Services activity contraction weakens in July to 34.2 as against 33.7 in June
- ❖ India-ASEAN Free Trade Agreement review can double bilateral trade: Hardeep Singh Puri
- ❖ Worst seems to be over, farm sector to cushion COVID-19 impact on economy: FinMin report
- ❖ July exports reach almost last year's level, said Commerce Minister Piyush Goyal

	Q3 FY2020(%)	Q2 FY2020(%)	Q3 FY2019(%)
GDP growth	4.7	4.5	6.6

Commodity Prices				
	Current	Week ago	Month ago	Year ago
Brent crude(\$/bbl)	45.17	43.75	43.10	59.81
Gold (RS/10 gms)	55,230	52,853	48,168	36,289

	May - 20 (%)	Apr - 20 (%)	Year ago (%) (May - 19)
CPI (Food)	9.28%	--	3.05
WPI	-3.21	--	2.45
Core Sector Output	-23.40	-38.12	3.80
IIP	-34.70	-55.50	3.10

Global market trends

- ❖ Wall Street gains on Disney's surprise profit, Covid-19 fiscal aid hopes
- ❖ As UK eases lockdown, services activity expands at fastest pace in 5 years to 56.5 in July
- ❖ Dubai launches economic reset programme for post-coronavirus world
- ❖ US job market recovery appears to be slowing, services sector rising ahead
- ❖ Oil prices rise to 5-month high on weak dollar, US crude stockpiles

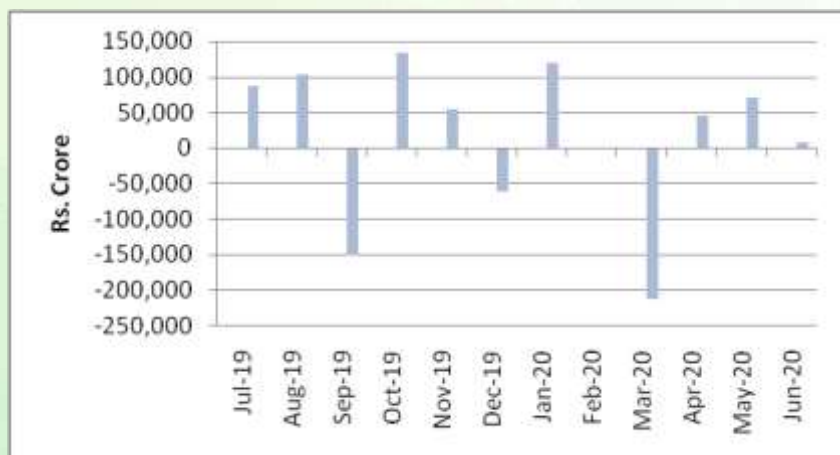
INR vs Global currency		
	Current	Prev close
USD	74.80	74.80
GBP	98.22	98.19
Euro	88.83	88.76
Yen	0.709	0.708
Yuan	10.77	10.77

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	1.14	1.92	-1.38	-15.20
Hang Seng	-1.56	-0.04	-4.91	-4.99
Nikkei 225	-0.59	0.16	-1.06	9.06
S&P 500	0.64	2.51	5.80	15.39
Shanghai Composite	-0.38	2.37	0.58	21.53

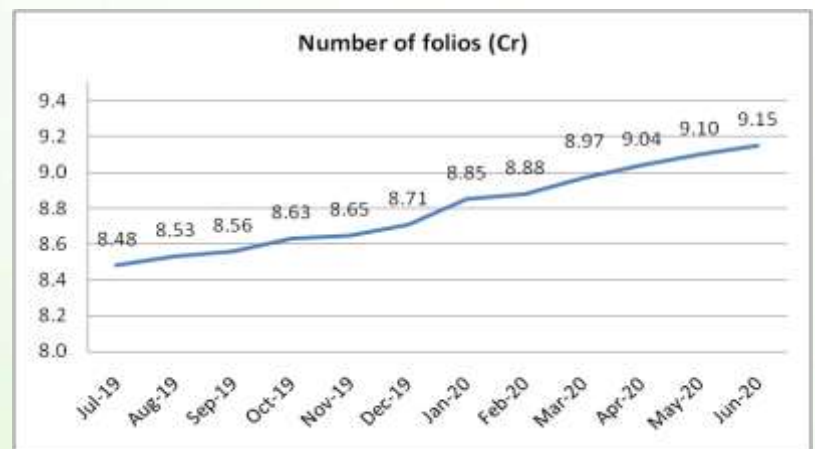
Mutual Fund Roundup

- ❖ Sebi may review curbs on MFs' equity investments
- ❖ Franklin Templeton Mutual Fund may face Sebi heat as audit sees lapses
- ❖ Four Franklin Templeton MF schemes see dip in NAV of up to 4.85% after Future group firms default
- ❖ Sebi mandates MFs to use RFQ platform for 10% of secondary transactions from October 1

Mutual fund inflows



Mutual fund folio growth



(Data source: NSE, NSDL, FIMMDA, investing.com, tradingeconomics.com, fx-rate.net, ACEMF, AMFI, RBI, equitymaster.com)

(Newsource: Economic Times, Business Standard)

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Mutual Fund investments are subject to market risks, read all scheme related documents carefully.