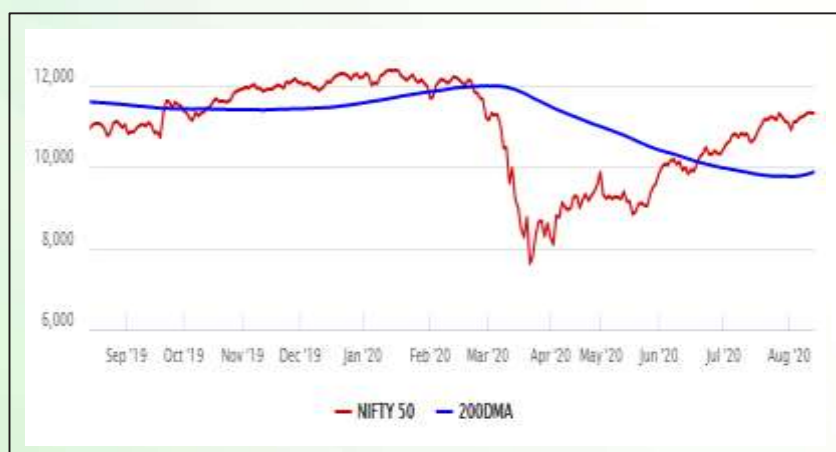


Equity Market

- ❖ Sensex ends 59 points lower at 38,310
- ❖ Index VIX declines 2.31% to 20.57
- ❖ Nifty P/E at 31.42, Nifty Midcap 100 P/E at 130.66

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	% chg	52 wk high	52 wk low
Nifty50	11300.5	-0.07	12430.5	7511.1
Nifty Mid cap 100	16524.8	1.57	18495.9	10750.0
Nifty Small cap 100	5433.7	0.75	6401.1	3202.9
Bank	22196.4	-0.30	32613.1	16116.3
Auto	7879.8	1.22	8501.2	4452.2
FMCG	31668.2	0.10	32644.9	22699.1
Pharma	11478.0	-0.97	10497.2	6242.9
Realty	209.0	0.92	336.4	160.9

Factors driving the market

- ❖ Uncertainty over US stimulus package and US-China trade meeting weighed on investors
- ❖ L&T top gainer on receiving significant contracts for various businesses
- ❖ Bharti Airtel dragged after MSCI cut its weight in two indices by half

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
Tata Motors	131.1	201.7	63.5
L&T	991.4	1551.0	661.0
Hindalco	183.2	221.2	84.9
Top Losers			
Sun Pharma	521.0	550.8	312.0
Eicher Motors	21660.1	23450.0	12450.1
Bharti Airtel	536.5	612.0	325.5

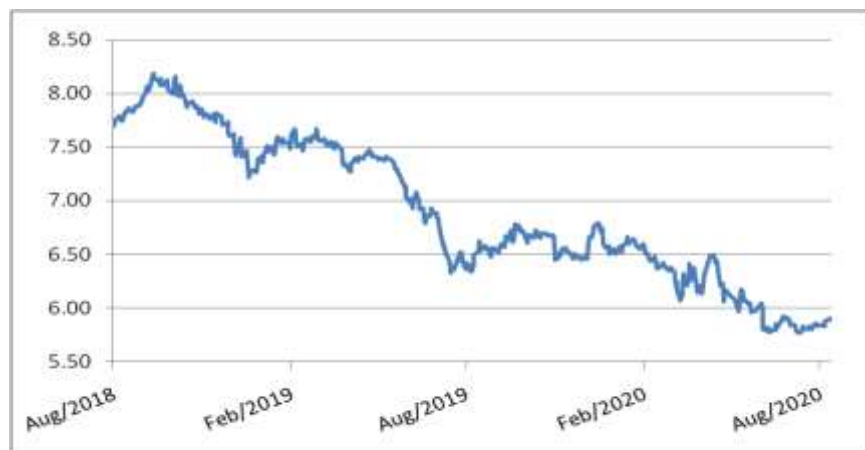
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
13-Aug-20	8032.4	4573.9	3458.6
12-Aug-20	16974.4	5203.2	11771.2
11-Aug-20	5867.7	4595.4	1272.3
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

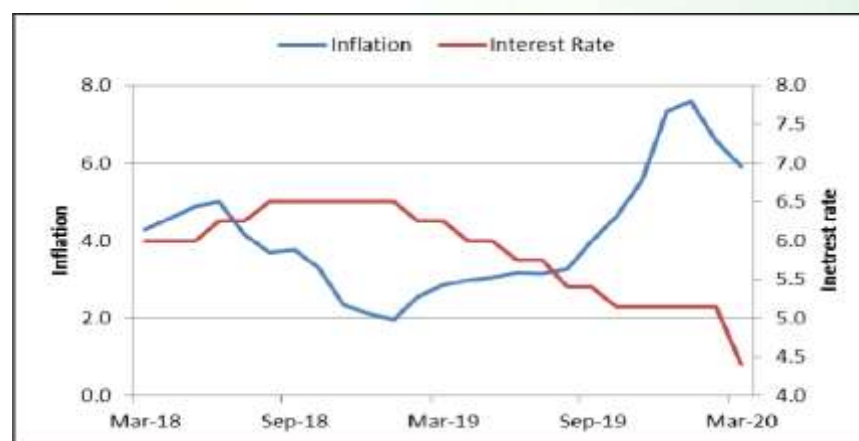
Debt Market

- ❖ Deutsche Bank likely bought Rs 7,000 crore DHFL bonds at 70-80% discount
- ❖ CARE Ratings has reaffirmed its assessment of Tata Motors across bank facilities, NCDs at AA- (negative outlook)
- ❖ Credit cost to more than double for NBFCs, says Acuite Ratings
- ❖ India Inc's foreign loans fall 35% on Future Retail default, shaky economy
- ❖ Shadow bank bond sales rebound as lenders raise Rs 81,300 crore since April

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	3.16
Repo rate	4.00
10 Yr Gsec yield	5.90
1-mth CP rate	3.48
3-mth CP rate	3.41
6-mth CP rate	3.85
1 Yr CP rate	4.08
1-mth CD rate	3.53
3-mth CD rate	3.38
6-mth CD rate	3.56
1 Yr CD rate	3.78

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Aug-14	G-sec auction	--
Aug-14	Total repo	--
Aug-14	Total reverse repo	6,00,451
Aug-14	Marginal standing facility	--
Aug-14	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
13-Aug-20	467.5	1157.6	(690.1)
12-Aug-20	941.4	295.8	645.6
11-Aug-20	142.5	439.3	(296.8)
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	0.07	12.02	8.56	9.35
Crisil Short Term Bond Fund Index	0.24	10.68	8.37	8.54
Crisil ST Debt Hybrid 75+25 Index	1.54	10.93	8.24	8.75
Crisil Liquid Fund Index	0.33	5.46	6.69	6.93

Macro

- ❖ Retail inflation inches up to 6.93% in July on the back of higher food prices
- ❖ Faceless tax assessment to promote transparency, empower honest taxpayers: India Inc
- ❖ Search and seizure, international tax cases out of faceless assessment ambit: CBDT
- ❖ Investment by PE/VCS halves to USD 4.1 billion in July: Report
- ❖ India announces USD 500 million assistance for major connectivity project in Maldives

	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)	44.96	45.09	42.72	61.30
Gold (RS/10 gms)	52,441	55,522	49,079	37,799

	Jun - 20 (%)	May - 20 (%)	Year ago (%) (Jun - 19)
CPI	6.09%	*9.28%	3.18
WPI	-1.81	-3.21	2.02
Core Sector Output	-15.00	-23.40	1.20
IIP	-16.60	-34.70	1.30

Global market trends

- ❖ US weekly jobless claims fall below 1 million for first time in 5 months
- ❖ French unemployment rate hits 37-year low in Q2 2020 as lockdown bites
- ❖ UAE, Israel agree to establish diplomatic ties in deal brokered by Trump
- ❖ World needs to spend at least \$100 billion on new tools to fight Covid-19: WHO
- ❖ Taiwan unveils record defence budget amid rising tensions with China

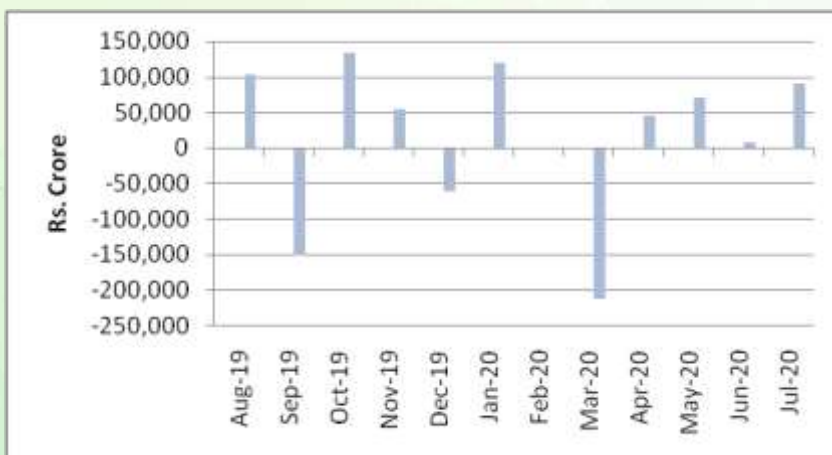
INR vs Global currency		
	Current	Prev close
USD	74.83	74.86
GBP	97.72	97.73
Euro	88.40	88.40
Yen	0.700	0.700
Yuan	10.77	10.77

Global equity benchmark indices returns (%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	-1.50	2.63	0.15	-14.69
Hang Seng	-0.12	1.20	-2.10	-0.20
Nikkei 225	0.18	3.71	2.04	13.66
S&P 500	-0.20	0.72	6.92	15.28
Shanghai Composite	-0.16	-1.94	-3.56	18.71

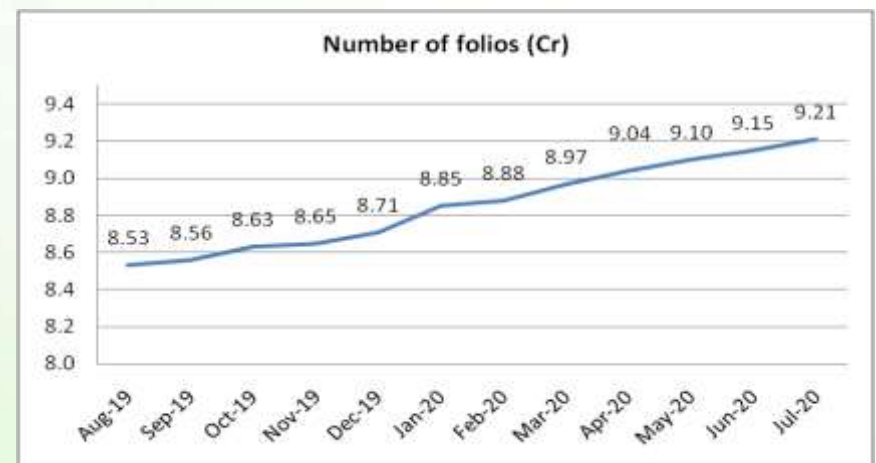
Mutual Fund Roundup

- ❖ Mutual fund inflows in July at Rs 89,813 crore
- ❖ Equity MFs witness outflows after 4 years in July at Rs 2,480 crore amid Covid-19 uncertainty
- ❖ Debt funds witness strong inflows of Rs 91,392 crore
- ❖ Hybrid schemes witness outflows of Rs 7,301 crore

Mutual fund inflows



Mutual fund folio growth



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

(Newssource: Economic Times, Business Standard) (*CPI Food price index)