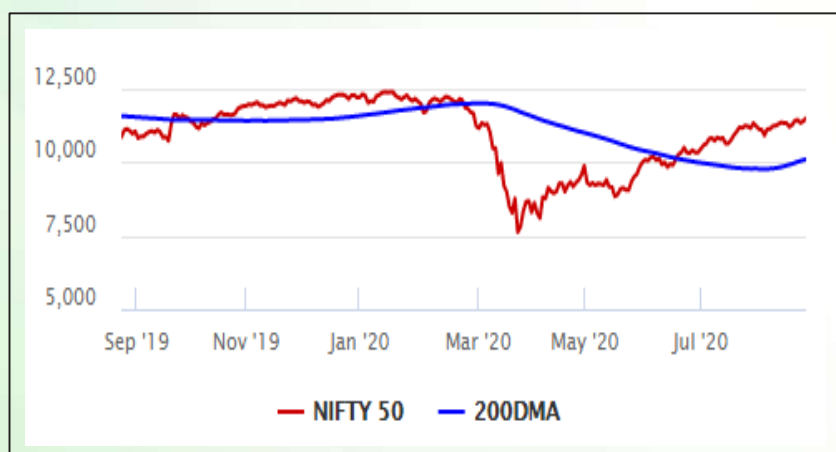


Equity Market

- ❖ Sensex soars 364 points to end at 38,799
- ❖ Index VIX declines 4.08% to 19.23
- ❖ Nifty P/E at 32.08, 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	11466.5	0.83	12430.5	7511.1
Nifty Mid cap 100	17101.5	0.70	18495.9	10750.0
Nifty Small cap 100	5754.2	1.67	6401.1	3202.9
Bank	22833.0	2.39	32613.1	16116.3
Auto	7948.4	0.17	8501.2	4452.2
FMCG	31642.0	0.12	32644.9	22699.1
Pharma	11572.3	-0.37	10497.2	6242.9
Realty	221.8	-1.00	336.4	160.9

Factors driving the market

- ❖ Private banks top driver of rally after RBI chief said loan restructuring will help revive economy
- ❖ Eicher Motors' stock split takes effect; shares surge 10%
- ❖ Real estate developer The Phoenix Mills up 4% on raising Rs 1,100 crore via QIP

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
ZEEL	201.2	376.0	114.0
Kotak Bank	1386.1	1740.0	1001.0
IndusInd Bank	530.7	1596.6	235.6
Top Losers			
Power Grid	185.3	211.3	122.2
M&M	602.6	648.6	245.4
Adani Ports	350.5	428.9	203.0

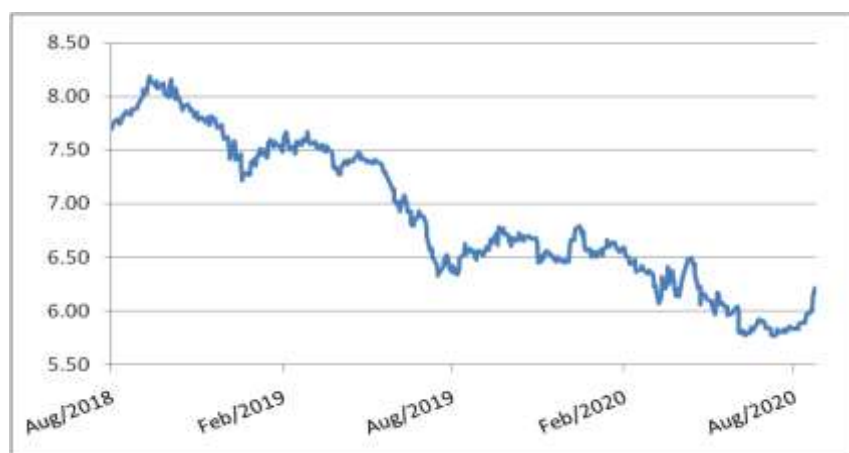
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
24-Aug-20	3915.6	3477.8	437.8
21-Aug-20	4819.7	4981.0	(161.3)
20-Aug-20	5545.9	4447.1	1098.8
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

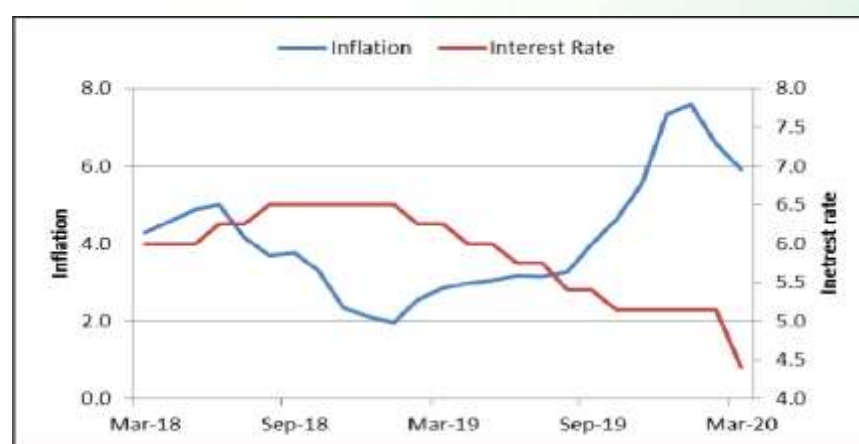
Debt Market

- ❖ RBI pushes lenders to raise funds over bad debt pile-up
- ❖ Future Retail pays interest on dollar bonds, averts default
- ❖ Suzlon board approves issuance of NCDs worth Rs 4.4K cr under debt recast plan
- ❖ Nabard launches credit guarantee programme for NBFC-MFIs
- ❖ Stimulus to ease funding burden for India's weakest firms in Covid era

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	3.09
Repo rate	4.00
10 Yr Gsec yield	6.22
1-mth CP rate	3.75
3-mth CP rate	3.70
6-mth CP rate	3.80
1 Yr CP rate	4.09
1-mth CD rate	3.23
3-mth CD rate	3.57
6-mth CD rate	3.49
1 Yr CD rate	3.78

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Aug-25	G-sec auction	--
Aug-25	Total repo	--
Aug-25	Total reverse repo	6,14,757
Aug-25	Marginal standing facility	202
Aug-25	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
24-Aug-20	1446.0	477.8	968.2
21-Aug-20	617.8	1731.4	(1113.6)
20-Aug-20	1363.1	643.4	719.7
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	-1.21	10.45	8.12	9.12
Crisil Short Term Bond Fund Index	-0.14	10.06	8.22	8.47
Crisil ST Debt Hybrid 75+25 Index	0.88	11.16	8.10	9.16
Crisil Liquid Fund Index	0.35	5.40	6.67	6.91

Macro

- ❖ Government, RBI need to share cost of maintaining UPI infrastructure: Report
- ❖ Food inflation expected to soften in second half of the current fiscal, says Crisil
- ❖ Above average monsoons brightens Kharif prospects, conducive for more accommodation by RBI: Report
- ❖ States stare at uncovered losses of up to Rs 3.1 lakh crore in FY21: SBI report
- ❖ GST reduced tax rates, doubled taxpayer base to 1.24 crore: Finance Ministry

	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)	45.01	45.37	43.34	58.49
Gold (RS/10 gms)	52,024	52,690	50,960	38,578

	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

- ❖ Asian stocks near two-year high as virus treatment hopes lift mood
- ❖ Brazil's GDP probably crumbled 9.4% in Q2 under coronavirus spread: Poll
- ❖ Singapore's core inflation gauge hits lowest in over a decade due to Covid
- ❖ China's losses from its overseas takeover binge are piling up fast
- ❖ Chinese premier says economy could grow this year despite Covid-19

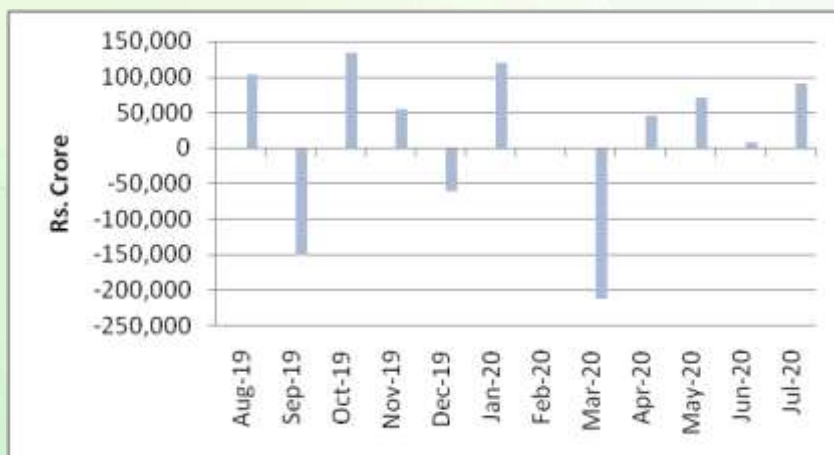
INR vs Global currency		
	Current	Prev close
USD	74.21	74.17
GBP	97.29	97.15
Euro	87.68	87.52
Yen	0.700	0.700
Yuan	10.74	10.73

Global equity benchmark indices returns (%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	1.71	-0.37	-0.31	-13.96
Hang Seng	1.74	0.81	3.43	-2.40
Nikkei 225	0.28	-0.48	1.03	10.98
S&P 500	1.00	1.46	6.71	20.52
Shanghai Composite	0.15	-1.55	5.91	16.85

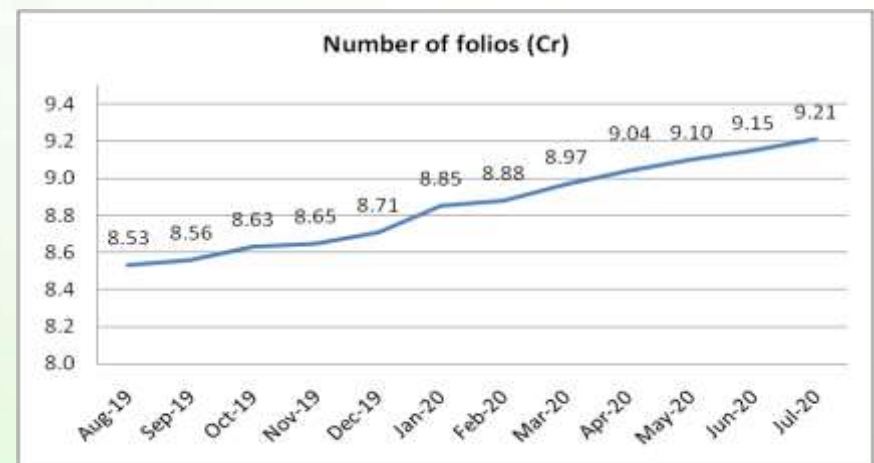
Mutual Fund Roundup

- ❖ MF industry instrumental in channelising retail savings into capital mkts in a big way: Amfi
- ❖ 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)

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

For AMFI/NISM Certified partners only. For private circulation only.

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