

Sept 05, 2022



END OF THE DAY SUMMARY



END OF THE DAY SUMMARY

DOMESTIC INDICES

	CLOSE	POINTS	% CHANGE
SENSEX	59246	443	0.75
NIFTY	17666	126	0.72
MIDCAP	25581	117	0.46
SMALL CAP	29057	256	0.89

BSE 200 GAINERS/LOSERS

GAINERS	% CHANGE	LOSERS	% CHANGE
TIINDIA	8.95	GLAND	-3.68
SCHAEFFLER	5.72	LALPATHLAB	-2.87
PATANJALI	4.87	ATGL	-2.76
INDHOTEL	4.57	ADANIPOWER	-2.66
IDFCFIRSTB	4.42	PAYTM	-2.60

BSE SECTORAL INDICES

	CLOSE	POINTS	% CHANGE
METAL	19074	381	2.04
CG	33170	352	1.07
BANKEX	45601	404	0.89
REALTY	3750	27	0.73
Finance	8508	60	0.71
TECK	13096	74	0.57
CD	42753	229	0.54
IT	28412	113	0.40
Healthcare	22793	55	0.24
AUTO	30339	52	0.17
POWER	5142	-5	-0.09
OIL & GAS	19670	-63	-0.32

ADVANCE/DECLINES

	BSE	% CHANGE
ADVANCES	2208	59
DECLINES	1348	36
UNCHANGED	180	5

COMMODITIES

	VALUE	ABSOLUTE CHANGE
GOLD (\$ / OUNCE)	1714.87	+2.65
SILVER (\$ / OUNCE)	18.2275	+0.1860
GOLD (RS. / 10 GRAMS)	50470	+102
SILVER (RS. / KG)	53540	+518
CRUDE OIL FUTURES OIL (\$ / BARREL)	89.16	+2.29

CURRENCY & BOND YIELD

	VALUE	ABSOLUTE CHANGE
USD/INR	79.84	+0.05
IND10 YR BOND YIELD	7.219	-0.013



VIEW ON MARKET PERFORMANCE

Nifty closed higher on Sept 05. Nifty opened higher and inched up through the day. At close, Nifty was up 0.72% or 126.4 points at 17665.8.

Among sectors, Metals, Capital Goods, Banks and Telecom indices rose the most while Oil & Gas index led the losers. While the advance decline ratio was positive at 1.78:1, Midcap index underperformed the Nifty but the Smallcap index outperformed.

Asian indices were mostly in the red, paced by losses in Hong Kong, where tech shares slid as traders weighed the risk of curbs on investment from the US and growing concerns over new COVID-19 lockdowns impacted sentiments. European stocks slumped and the euro fell Monday as the region's worsening energy crisis added to risks for a global economy already facing high inflation and a wave of monetary tightening.

Economic activity in the Eurozone contracted further in August, with the S&P Global Composite PMI index falling to 48.9 from 49.9 the previous month. A gauge of India's services sector recovered from a four-month low, led by job creation and new businesses. The India Services Business Activity Index, compiled by IHS Markit, stood at 57.2 in August compared with 55.5 in July. The Composite PMI Output Index stood at 58.2 against 56.6 the month before.

Nifty broke out nicely of the two day range move. Given the subdued sentiments abroad, it may find it difficult to rise sharply from hereon. As US markets are shut today, no cues will be available for Indian markets from there. Nifty could stay in the 17778-17476 band for the near term.



END OF THE DAY SUMMARY

Disclaimer:

This report has been prepared by HDFC Securities Ltd and is meant for sole use by the recipient and not for circulation. The information and opinions contained herein have been compiled or arrived at, based upon information obtained in good faith from sources believed to be reliable. Such information has not been independently verified and no guaranty, representation of warranty, express or implied, is made as to its accuracy, completeness or correctness. All such information and opinions are subject to change without notice. This document is for information purposes only. Descriptions of any company or companies or their securities mentioned herein are not intended to be complete and this document is not, and should not be construed as an offer or solicitation of an offer, to buy or sell any securities or other financial instruments.

This report is not directed to, or intended for display, downloading, printing, reproducing or for distribution to or use by, any person or entity who is a citizen or resident or located in any locality, state, country or other jurisdiction where such distribution, publication, reproduction, availability or use would be contrary to law or regulation or what would subject HSL or its affiliates to any registration or licensing requirement within such jurisdiction.

If this report is inadvertently sent or has reached any person in such country, especially, United States of America, the same should be ignored and brought to the attention of the sender. This document may not be reproduced, distributed or published in whole or in part, directly or indirectly, for any purposes or in any manner.

Foreign currencies denominated securities, wherever mentioned, are subject to exchange rate fluctuations, which could have an adverse effect on their value or price, or the income derived from them. In addition, investors in securities such as ADRs, the values of which are influenced by foreign currencies effectively assume currency risk.

It should not be considered to be taken as an offer to sell or a solicitation to buy any security. HSL may from time to time solicit from, or perform broking, or other services for, any company mentioned in this mail and/or its attachments.

HSL and its affiliated company(ies), their directors and employees may; (a) from time to time, have a long or short position in, and buy or sell the securities of the company(ies) mentioned herein or (b) be engaged in any other transaction involving such securities and earn brokerage or other compensation or act as a market maker in the financial instruments of the company(ies) discussed herein or act as an advisor or lender/borrower to such company(ies) or may have any other potential conflict of interests with respect to any recommendation and other related information and opinions.

HSL, its directors, analysts or employees do not take any responsibility, financial or otherwise, of the losses or the damages sustained due to the investments made or any action taken on basis of this report, including but not restricted to, fluctuation in the prices of shares and bonds, changes in the currency rates, diminution in the NAVs, reduction in the dividend or income, etc.

HSL and other group companies, its directors, associates, employees may have various positions in any of the stocks, securities and financial instruments dealt in the report, or may make sell or purchase or other deals in these securities from time to time or may deal in other securities of the companies / organizations described in this report.

HSL or its associates might have managed or co-managed public offering of securities for the subject company or might have been mandated by the subject company for any other assignment in the past twelve months.

HSL or its associates might have received any compensation from the companies mentioned in the report during the period preceding twelve months from the date of this report for services in respect of managing or co-managing public offerings, corporate finance, investment banking or merchant banking, brokerage services or other advisory service in a merger or specific transaction in the normal course of business.

HSL or its analysts did not receive any compensation or other benefits from the companies mentioned in the report or third party in connection with preparation of the research report. Accordingly, neither HSL nor Research Analysts have any material conflict of interest at the time of publication of this report. Compensation of our Research Analysts is not based on any specific merchant banking, investment banking or brokerage service transactions. HSL may have issued other reports that are inconsistent with and reach different conclusion from the information presented in this report.

Research entity has not been engaged in market making activity for the subject company. Research analyst has not served as an officer, director or employee of the subject company. We have not received any compensation/benefits from the subject company or third party in connection with the Research Report.

HDFC securities Limited, I Think Techno Campus, Building - B, "Alpha", Office Floor 8, Near Kanjurmarg Station, Opp. Crompton Greaves, Kanjurmarg (East), Mumbai 400 042 Phone: (022) 3075 3400 Fax: (022) 2496 5066
Compliance Officer: Murli V Karkera Email: complianceofficer@hdfcsec.com Phone: (022) 3045 3600

HDFC Securities Limited, SEBI Reg. No.: NSE, BSE, MSEI, MCX: INZ000186937; AMFI Reg. No. ARN: 13549; PFRDA Reg. No. POP: 11092018; IRDA Corporate Agent License No.: CA0062; SEBI Research Analyst Reg. No.: INH000002475; SEBI Investment Adviser Reg. No.: INA000011538; CIN - U67120MH2000PLC152193

Mutual Funds Investments are subject to market risk. Please read the offer and scheme related documents carefully before investing.