



01 Jul.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,722	(0.2) %	5.7 %
BSE SENSEX	52,483	(0.1) %	4.9 %
CNX BANK	34,772	(0.7) %	2.7 %
CNX MIDCAP	26,971	0.3 %	11.8 %
CNX SMALLCAP	9,734	0.2 %	17.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,503	0.6 %	12.7 %
S&P 500	4,298	0.1 %	14.4 %
FTSE 100	7,037	(0.7) %	7.1 %
HANG SENG	28,828	(0.6) %	4.9 %
NIKKEI	28,792	(0.1) %	5.6 %
SHANGHAI COMPOSITE	3,591	0.5 %	2.5 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.12	0.1 %	1.6 %
EUR/USD	1.19	(0.1) %	(2.8) %
GBP/USD	1.39	0.1 %	1.8 %
USD/JPY	110.68	(0.1) %	7.3 %
USD/AUD	1.32	0.1 %	1.7 %
USD/SGD	1.34	0.0 %	1.6 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	0.1 %	53.3 %
Gold(INR/10g)	46,504	(0.6) %	(8.8) %
Gold Comex(USD/oz)	1,765	(0.8) %	(9.5) %
SILVER(INR/1Kg)	67,639	(0.4) %	(1.8) %
Aluminium(USD/MT)	2,519	2.5 %	25.1 %
Copper(USD/MT)	9,226	(1.2) %	16.5 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	0.6 %

**Global Economy:** Data from Automatic Data Processing, Inc. (ADP) showed private sector in the US hired 692,000 workers in the month of June, higher than an expected addition of 600,000. According to a report released by the Institute for Supply Management (ISM), the MNI Chicago Business Barometer came in with a reading of 66.1 for June, down from a score of 75.2 in the previous month. Data released by the National Association of Realtors (NAR) showed pending home sales in the U.S. increased by 13.1% year-on-year in May, after soaring by a record 51.7% in April. China's official manufacturing PMI edged down to 50.9 in June from 51.0 a month earlier, according to the National Bureau of Statistics. This was the weakest pace of expansion in factory activity since February, amid high raw material costs and port disruptions in the export province of Guangdong. It remained above the 50-point mark that separates growth from contraction on a monthly basis. New export orders fell for a second consecutive month in June and at a faster pace, likely due to the global resurgence of COVID-19 variants, forcing some countries to reimpose lockdowns. Euro area annual inflation is expected to be 1.9% in June 2021, down from 2.0% in May according to a flash estimate from Eurostat, the statistical office of the European Union. The core inflation that excludes energy food, alcohol and tobacco, also eased to 0.9% from 1% in the previous month. UK gross domestic product dropped 1.6% sequentially instead of 1.5% fall estimated previously, revised data from the Office for National Statistics revealed on Wednesday. GDP was up 1.3% in the fourth quarter of 2020. On a yearly basis, the economy contracted by an unrevised 6.1%. Japan's consumer confidence index increased by 3.3 points from the previous month to 37.4 in June, compared with 34.1 in May. Japan industrial production slumped 5.9% month-over-month in May, after a final 2.9% gain a month earlier, official data showed.

**Global Equities:** The DOW edged higher amid steady undertone in US daily Covid-19 cases though broad concerns related to the infrastructure deal weighed on the sentiments.

**Indian Economy:** India's current account in the balance of payments ended in a surplus to the extent of 0.9% of GDP in FY '21 for the first time in 17 years. The non-food bank credit growth slowed to 5.9% in May 2021, as compared to 6.1% in the year-ago month, RBI data showed. Retail inflation for industrial workers rose marginally to 5.24% in May 2021 from 5.14% in April.

**Equity Markets:** The domestic equity benchmarks ended with minor losses on Wednesday. The Nifty closed below the 15,750 mark. Pharma shares witnessed some bit of profit taking after a three-day winning streak.

**Corporate News:** Indian Oil's board has given "stage - 1" approval for implementation of India's maiden styrene monomer project with a capacity of 387,000 metric tonnes per annum at the company's refinery & petrochemical complex at Panipat. Fair trade regulator CCI on Wednesday approved acquisition of entire shareholding in SB Energy by Adani Green Energy Ltd. Dish TV India reported consolidated loss at Rs 1,415.23 crore in Q4FY21 against a loss of Rs 1,456.25 crore in Q4FY20, revenue fell to Rs 751.75 crore from Rs 869.06 crore YoY.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	443.3	78.5	15.9
MF(INR cr)	(20.2)	(85.2)	110.8

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	64,125	74,018	74,052
F&O(INR cr)	4,950,416	4,608,723	4,535,741

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.8	17.1	18.1
NSE VIX	13.1	14.9	18.7

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,772	(0.7) %	2.7 %	Energy	19,822	(0.1) %	7.1 %
IT	29,168	0.6 %	12.3 %	Pharma	14,309	(0.1) %	15.6 %
Metals	5,216	(0.2) %	24.5 %	Finance	16,444	(0.6) %	3.4 %
Auto	10,600	(0.1) %	5.8 %	PSU	2,519	(0.4) %	13.7 %
FMCG	36,093	(0.4) %	3.5 %	Real Estate	344	(0.4) %	2.4 %

## 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>
Avenue Sup	3,344	2.2 %	14.8 %	Adani Tran	1,059	(5.0) %	6.0 %
Abbott Ind	16,809	1.6 %	12.2 %	Shree Ceme	27,505	(2.2) %	(8.2) %
Coal India	147	1.5 %	11.0 %	DLF	281	(2.1) %	(3.7) %
Siemens	2,021	1.4 %	8.8 %	ACC	2,015	(1.9) %	5.3 %
Indraprast	558	1.4 %	5.9 %	Bandhan Ba	330	(1.7) %	(5.9) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
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No Data Found

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