



02 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,430	0.0 %	26.4 %
BSE SENSEX	35,414	1.4 %	25.9 %
CNX BANK	21,978	0.0 %	20.7 %
CNX MIDCAP	14,778	0.0 %	28.8 %
CNX SMALLCAP	4,654	0.0 %	31.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,735	(0.3) %	(9.8) %
S&P 500	3,116	0.5 %	(3.6) %
FTSE 100	6,158	(0.2) %	(19.0) %
HANG SENG	24,427	0.5 %	(14.4) %
NIKKEI	22,122	(0.8) %	(4.7) %
SHANGHAI COMPOSITE	3,026	1.4 %	(1.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.20	(0.0) %	5.6 %
EUR/USD	1.12	(0.1) %	0.2 %
GBP/USD	1.24	0.8 %	(5.8) %
USD/JPY	107.57	0.2 %	(1.0) %
USD/AUD	1.45	(0.6) %	1.5 %
USD/SGD	1.39	0.0 %	3.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	39	0.0 %	(35.8) %
Gold(INR/10g)	48,730	0.9 %	25.0 %
Gold Comex(USD/oz)	1,781	(1.1) %	15.5 %
SILVER(INR/1Kg)	49,585	2.5 %	7.7 %
Aluminium(USD/MT)	1,594	(0.5) %	(10.1) %
Copper(USD/MT)	6,017	(0.4) %	(2.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	0.0 %	(1.2) %

Global Economy: The minutes of the Federal Reserve's June meeting showed participants discussed new tools for conducting monetary policy. The minutes showed the meeting included briefings on the roles of forward guidance and large-scale asset purchase programs as well as implementing yield curve control. The ISM said its purchasing managers index jumped to 52.6 in June from 43.1 in May, with a reading above 50 indicating an expansion in manufacturing activity. ADP a significant increase in US private sector employment in the month of June as well as a substantial upward revision to the data for May. ADP said private sector employment jumped by 2.369 million jobs in June. Employment soared by 3.065 million jobs in May compared to the previously reported loss of 2.760 million jobs. China manufacturing sector picked up steam in June, with a manufacturing PMI core of 51.2, the latest survey from Caixin showed on Wednesday. That's up from 50.7 in May. Individually, total new work increased for the first time since January, although external demand remained subdued. UK manufacturing sector stabilized in June, following the steep downturn caused by the coronavirus, or Covid-19, pandemic, final data from IHS Markit showed Wednesday. The Chartered Institute of Procurement & Supply/ IHS Markit manufacturing Purchasing Managers' Index jumped to 50.1 in June from 40.7 in May. Japan manufacturing sector continued to contract in June, with a manufacturing PMI score of 40.1, the latest survey from Jibun Bank revealed on Wednesday. That's up from 38.4 in May, although it remains beneath the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: DOW slipped modestly while NASDAQ hit record high. European markets saw a volatile movement.

Indian Economy: The India Manufacturing Purchasing Managers Index (PMI) compiled by IHS Markit, edged up to 47.2 in June, compared with 30.8 in May on a seasonally adjusted basis. India's manufacturing sector moved towards stabilisation in June with both output and new orders contracting at much softer rates than seen in April. India's manufacturing PMI in June is higher than May's reading but it is the 3rd month in a row that India's manufacturing PMI has been lower than 50. PMI less than 50 indicated contraction in business activity. India Manufacturing PMI data pointed to deterioration in business conditions faced by Indian goods producers during June. The downturn was primarily driven by sharp contractions in both output and new orders, with regional lockdown extensions severely hampering demand conditions.

Equity Markets: Domestic benchmarks ended with strong gains on Wednesday. Positive global cues and recovering domestic macro data cheered investors. Banks stocks rallied while pharma stocks corrected. As per provisional closing, the barometer S&P BSE Sensex rallied 498.65 points or 1.43% at 35,414.45. The Nifty 50 index surged 116.75 points or 1.13% at 10,418.85.

Corporate News: Maruti Suzuki has sold 51,274 passenger car units in the domestic market in June. In the same period last year, the company had sold 1,11,014 passenger vehicle units. pandemic. Government of India has approved a scheme to improve the liquidity position of NBFCs/HFCs through a Special Purpose Vehicle (SPV) to avoid any potential systemic risks to the financial sector.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(257.2)	112.4	71.8
MF(INR cr)	714.2	(184.5)	(90.0)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	52,747	52,747	52,825
F&O(INR cr)	1,659,235	1,659,235	1,398,072

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.6	28.6	34.4
NSE VIX	28.1	28.1	36.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,978	2.8 %	20.7 %	Energy	14,474	0.5 %	34.4 %
IT	14,732	(0.2) %	22.3 %	Pharma	9,883	(1.0) %	40.6 %
Metals	1,997	0.3 %	28.6 %	Finance	10,843	2.7 %	21.3 %
Auto	6,719	(0.0) %	44.3 %	PSU	1,480	3.6 %	15.3 %
FMCG	30,233	0.6 %	14.7 %	Real Estate	201	(0.7) %	16.9 %

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>
Axis Bank	433	6.5 %	20.8 %	M & M	499	(2.3) %	82.9 %
Bank of Ba	51	5.8 %	0.3 %	NTPC	94	(2.3) %	15.6 %
Bajaj Fins	6,169	5.5 %	37.0 %	Colgate-Pa	1,375	(2.3) %	10.6 %
UPL	447	5.1 %	46.2 %	Nestle Ind	16,799	(2.2) %	7.3 %
Punjab Nat	36	4.7 %	19.5 %	Cipla	627	(2.1) %	51.6 %

EVENTS CALENDAR

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

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