



02 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,704	0.2 %	5.6 %
BSE SENSEX	52,319	(0.3) %	4.8 %
CNX BANK	34,684	0.0 %	2.4 %
CNX MIDCAP	26,883	0.0 %	11.5 %
CNX SMALLCAP	9,798	0.0 %	18.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,634	0.4 %	13.2 %
S&P 500	4,320	0.5 %	15.0 %
FTSE 100	7,125	1.3 %	8.4 %
HANG SENG	28,828	(0.6) %	4.9 %
NIKKEI	28,707	(0.3) %	5.3 %
SHANGHAI COMPOSITE	3,589	(0.1) %	2.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.22	0.1 %	1.7 %
EUR/USD	1.19	(0.4) %	(3.2) %
GBP/USD	1.38	(0.4) %	1.4 %
USD/JPY	110.75	0.1 %	7.3 %
USD/AUD	1.33	0.9 %	2.7 %
USD/SGD	1.34	0.1 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	75	2.4 %	58.0 %
Gold(INR/10g)	47,075	1.2 %	(7.7) %
Gold Comex(USD/oz)	1,780	0.3 %	(8.7) %
SILVER(INR/1Kg)	68,901	1.9 %	0.1 %
Aluminium(USD/MT)	2,481	(1.7) %	23.2 %
Copper(USD/MT)	9,342	(0.5) %	18.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.0) %	0.5 %

Global Economy: The International Monetary Fund raised its 2021 US growth projection sharply to 7.0% due to a strong recovery from the Covid-19 pandemic and an assumption that much of President Joe Biden's infrastructure and social spending plans will be enacted. The IMF in its report stated that the US economy is coming out on a strong footing from the very difficult circumstances of the past year. US manufacturing PMI slipped to 60.6 in June from 61.2 in May, although a reading above 50 still indicates growth in the manufacturing sector, a report released by the Institute for Supply Management on Thursday showed. The US manufacturing PMI slipped to 60.6 in June from 61.2 in May, the Institute for Supply Management showed. The modest decrease by the headline index partly reflected a slowdown in the pace of growth in new orders, as the new orders index fell to 66.0 in June from 67.0 in May. Chinese factory activity growth slowed in June. The Caixin/Markit manufacturing PMI for June came in at 51.3, a lower reading than May's 52.0. PMI readings above 50 represent expansion, while those below that indicate contraction. This was the lowest reading in three months. Euro area manufacturing PMI rose to 63.4 in June from 63.1 in May, data from IHS Markit showed on Thursday. The final reading was higher than the flash 63.1. June marked a twelfth successive month that the index has posted above the 50.0 no-change mark that separates growth from contraction. UK manufacturing PMI dropped slightly to 63.9 in June from May's record high of 65.6, final survey results from IHS Markit showed. Japan Manufacturing PMI in June slipped to 52.4 on a seasonally adjusted basis from 53.0 in the previous month, final au Jibun Bank manufacturing PMI showed.

Global Equities: The US stocks saw a mixed performance but overall sentiments were supported. The S&P 500 hit another new record closing high.

Indian Economy: India's manufacturing industry fell back into decline during June, as the intensification of the pandemic and strict containment measures negatively impacted on demand. The latest results highlighted renewed contractions in factory orders, production, exports and quantities of purchases. With business optimism fading over the month, job shedding continued. Registering 48.1 in June as against 50.8 in May, the seasonally adjusted IHS Markit India Manufacturing Purchasing Managers Index was below the critical no-change mark of 50.0 for the first time since July 2020.

Equity Markets: The key equity indices ended with modest losses on Thursday. The Nifty closed below the 15,700 mark. Auto shares witnessed value buying following monthly sales data. Trading was volatile due to expiry of weekly index options on the NSE.

Corporate News: Tata Consultancy Services (TCS) partnered with John Wiley & Sons, an American multinational publishing company, to modernize its ecommerce platform with SAP Commerce, creating a unified, seamless customer experience. Heading into the upcoming festive season, the company remains cautiously optimistic about the customer demand in the coming months. Coal India and its subsidiaries on a provisional basis achieved coal production of 40 million tonnes in June 2021 compared to 39.2 million tonnes in June 2020, recording a growth of 2%. Coal offtake stood at 51.3 million tonnes in June 2021 compared to 41.7 million tonnes in June 2020, recording a growth of 23%.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(150.7)	68.1	13.1
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)	57,568	57,568	73,782
F&O(INR cr)	8,409,745	8,409,745	4,598,225

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.8	15.8	18.0
NSE VIX	12.8	12.8	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	34,684	(0.3) %	2.4 %	Energy	19,709	(0.6) %	6.4 %
IT	29,003	(0.6) %	11.6 %	Pharma	14,442	0.9 %	16.7 %
Metals	5,207	(0.2) %	24.3 %	Finance	16,377	(0.4) %	2.9 %
Auto	10,688	0.8 %	6.6 %	PSU	2,522	0.1 %	13.9 %
FMCG	36,235	0.4 %	3.9 %	Real Estate	343	(0.3) %	2.1 %

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>
Info Edg.(5,317	8.2 %	24.7 %	Adani Tran	1,007	(5.0) %	0.7 %
Dabur Indi	590	3.7 %	9.5 %	Adani Gree	1,069	(5.0) %	(7.9) %
Dr Reddy's	5,559	2.5 %	21.2 %	Bajaj Fins	11,816	(2.4) %	20.7 %
Indraprast	571	2.3 %	8.4 %	Indus Towe	235	(1.7) %	(8.2) %
GAIL (Indi	153	2.2 %	9.2 %	Gland Phar	3,367	(1.7) %	36.4 %

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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