



03 Jul.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,552	0.0 %	27.8 %
BSE SENSEX	35,844	1.2 %	27.3 %
CNX BANK	21,953	0.0 %	20.6 %
CNX MIDCAP	14,945	0.0 %	30.3 %
CNX SMALLCAP	4,696	0.0 %	32.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,827	0.4 %	(9.5) %
S&P 500	3,130	0.5 %	(3.1) %
FTSE 100	6,240	1.3 %	(17.9) %
HANG SENG	25,124	2.9 %	(12.0) %
NIKKEI	22,146	0.1 %	(4.6) %
SHANGHAI COMPOSITE	3,091	2.1 %	0.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.68	(0.7) %	4.9 %
EUR/USD	1.13	0.3 %	0.4 %
GBP/USD	1.25	1.3 %	(5.3) %
USD/JPY	107.51	(0.3) %	(1.1) %
USD/AUD	1.44	(0.7) %	1.3 %
USD/SGD	1.39	(0.1) %	3.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	39	0.0 %	(35.8) %
Gold(INR/10g)	48,173	(1.1) %	23.5 %
Gold Comex(USD/oz)	1,789	0.4 %	16.0 %
SILVER(INR/1Kg)	48,374	(2.4) %	5.0 %
Aluminium(USD/MT)	1,602	0.5 %	(9.6) %
Copper(USD/MT)	6,080	1.1 %	(1.4) %

**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) %	(1.3) %

**Global Economy:** The US Nonfarm payrolls rose by 4.8 million in June while the unemployment rate fell to a crisis low of 11.1%, also better than the 12.4% estimate. Those on temporary layoff fell by 4.8 million in June to 10.6 million after a decrease of 2.7 million in May. The jobs growth marked a big leap from the 2.7 million in May, which was revised up by 190,000. The June figure is the largest single-month gain in US history. Euro area unemployment rate climbed to 7.4% in May from 7.3 percent in April, figures from Eurostat showed Thursday. In the same period last year, the jobless rate was 7.6%. The number of people out of work increased by 159,000 from April to 12.146 million in May. Eurozone producer prices continued to decline in May amid falling energy prices, data from Eurostat showed on Thursday. Producer prices decreased 5% on a yearly basis in May, following a 4.5% decline in April. Australia trade surplus increased to A\$8.02 billion in May from A\$7.83 billion in the previous month, as the decline in imports exceeded the fall in exports, data published by the Australian Bureau of Statistics showed Thursday. Exports of goods and services decreased 4% on monthly basis to A\$35.74 billion.

**Global Equities:** The US stocks extended their gains, rallying on the back of smashing jobs data and firm risk sentiments.

**Indian Economy:** Minister of Petroleum and Natural Gas & Steel Dharmendra Pradhan has said that India is all set to emerge as one of the primary drivers of growth in gas demand in Asia, despite the pressing Covid-19 challenges, owing to a combination of Government's pursuance of consistent policies and initiatives, as well as fast developing pipeline infrastructure. In order to give a fillip to the gas based economy, focus is being given to enhancing domestic gas production, expeditious development of gas infrastructure as well as development of Gas market by providing open access to gas infrastructure. Union Minister of Chemicals and Fertilisers D. V. Sadananda Gowda expressed gratitude to Ministry of Railways for helping move 73 fertiliser rakes in a single day on June 30, 2020. Till date, this is a record number of fertiliser rakes moved in a single day, he stated. During the month of June this year, average movement of Fertilizer rakes was 56.5 per day. It's also a record number for any June month historically.

**Equity Markets:** Domestic shares rallied on Thursday, mirroring positive global markets as increasing optimism for a safe and effective COVID-19 vaccine eased concerns about a second wave of infections. US-based Pfizer Inc said a COVID-19 vaccine being developed with German biotech firm BioNTech showed promise and was found to be well-tolerated in early-stage human trials.

**Corporate News:** IT counters could be under pressure as Indian Rupee surged sharply yesterday on a continued spurt in local equities. INR closed at 75.04 per US dollar, soaring 55 paise on the day. PNC Infratech said that CARE reaffirmed its credit rating on the long term bank facilities of the company's four subsidiaries. VST Tillers and Tractors said that its June sales stood at 805 tractors against 728 units in the same period last year. Sales of power tillers stood at 2,675 units against 3,325 units YoY.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(223.0)	(223.0)	66.8
MF(INR cr)	758.1	758.1	(21.6)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	56,543	54,645	52,886
F&O(INR cr)	3,458,396	2,558,816	1,431,848

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.7	28.2	34.2
NSE VIX	26.5	27.3	36.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,953	(0.1) %	20.6 %	Energy	14,625	1.0 %	35.8 %
IT	15,123	2.7 %	25.5 %	Pharma	9,944	0.6 %	41.5 %
Metals	2,017	1.0 %	29.8 %	Finance	10,907	0.6 %	22.0 %
Auto	6,907	2.8 %	48.3 %	PSU	1,478	(0.1) %	15.2 %
FMCG	30,316	0.3 %	15.0 %	Real Estate	201	(0.1) %	16.8 %

### 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>
Motherson	104	6.7 %	78.9 %	H P C L	215	(3.2) %	16.9 %
Bandhan Ba	346	6.3 %	77.7 %	Axis Bank	423	(2.3) %	18.0 %
M & M	530	6.2 %	94.1 %	Divi's Lab	2,197	(2.0) %	17.0 %
Bosch	11,915	5.5 %	29.0 %	Vedanta	106	(1.2) %	69.8 %
Hero Motoc	2,671	4.9 %	62.9 %	UPL	442	(1.0) %	44.7 %

### EVENTS CALENDAR

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

..... End of Report .....