



03 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,073	(0.3) %	34.2 %
BSE SENSEX	37,607	(0.3) %	33.0 %
CNX BANK	21,640	(0.0) %	18.8 %
CNX MIDCAP	15,471	0.4 %	34.9 %
CNX SMALLCAP	5,011	0.8 %	41.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,428	0.4 %	(7.4) %
S&P 500	3,271	0.8 %	1.2 %
FTSE 100	5,898	(1.5) %	(22.4) %
HANG SENG	24,595	(0.5) %	(13.8) %
NIKKEI	21,710	(2.8) %	(6.4) %
SHANGHAI COMPOSITE	3,310	0.7 %	7.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.62	0.0 %	4.8 %
EUR/USD	1.18	0.4 %	5.5 %
GBP/USD	1.31	0.7 %	(0.5) %
USD/JPY	105.11	0.1 %	(3.3) %
USD/AUD	1.39	(0.2) %	(2.3) %
USD/SGD	1.37	(0.2) %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	(6.2) %	(34.2) %
Gold(INR/10g)	53,615	1.0 %	37.5 %
Gold Comex(USD/oz)	1,981	1.0 %	28.4 %
SILVER(INR/1Kg)	63,877	3.2 %	38.7 %
Aluminium(USD/MT)	1,686	0.2 %	(4.9) %
Copper(USD/MT)	6,447	0.2 %	4.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.5	(0.0) %	(1.4) %

Global Economy: Consumer sentiment in the US deteriorated by more than initially estimated in the month of July, according to a report released by the University of Michigan on Friday. The report said the consumer sentiment index for July was downwardly revised to 72.5 from the preliminary reading of 73.2. The index is down from 78.1 in June. China manufacturing sector continued to expand in July, the National Bureau of Statistics said on Friday with a manufacturing PMI score of 51.1. It also moves further above the boom-or-bust line of 50 that separates expansion contraction. The bureau also noted that its non-manufacturing PMI came in with a score of 54.2, down from 54.4 in the previous month. Eurozone economy fell 12.1% on a quarterly basis, bigger than the 3.6% drop in the first quarter amid the coronavirus pandemic, preliminary flash estimate published by Eurostat showed Friday. This was the sharpest decline seen since the series began in 1995. Year-on-year, GDP was down 15% in the second quarter versus a 3.1% decline a quarter ago. UK house prices index rose 1.5% year-on-year after a 0.1% fall in June, survey data from the Nationwide Building Society showed on Friday. House prices rose 1.7% from June, when they fell 1.4%. Japan industrial output was up a seasonally adjusted 2.7% on month in June, the Ministry of Economy, Trade and Industry said on Friday, following the 8.9% decline in May. On a yearly basis, industrial production sank 17.7%, following the 26.3 percent contraction in the previous month.

Global Equities: US stocks moved up after initial weakness on Friday. The tech-heavy Nasdaq soared 1.5%.

Indian Economy: The growth rate of Index of Eight Core Industries for June 2020 declined by 15.0 % (provisional) compared to decline of 22.0 % (revised) in previous month of May 2020. Its cumulative growth during April to June, 2020-21 was -24.6 %. India's fiscal deficit reached Rs 6.62 lakh crore, or 83.2% of the budgeted estimate in the quarter ended June. The gap between the revenue and expenditure during the same period in 2019-20 stood at 61.4% of the budgeted target.

Equity Markets: Key domestic benchmarks ended with modest losses on Friday, dragged by Reliance Industries and HDFC twins. Global cues were subdued following a record contraction in US gross domestic in the second quarter.

Corporate News: Union Minister of Finance and Corporate Affairs Nirmala Sitharaman has said that the government is working with RBI on the Industry's need for the restructuring of loans due to the COVID-19 impact. While addressing the National Executive Committee Meeting (NECM) of the Federation of Indian Chambers of Commerce and Industry (FICCI), Sitharaman noted that the focus is on restructuring. Finance ministry is actively engaged with RBI on this. Punjab National Bank will be in focus as the bank cut lending rate by 25 basis points across tenures w.e.f August 1. Tata Motors Ltd reported that its loss widened to Rs 8,438 crore in the three months to June from Rs 3,698 crore in the year-ago period, due to the Coronavirus pandemic. Revenue from operations for the company, during the June quarter fell significantly to Rs 31,983.1 crore, compared to Rs 61,467 crore in the year-ago period.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	190.0	58.0	68.0
MF(INR cr)	(300.3)	(366.5)	(120.5)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	65,603	61,928	55,299
F&O(INR cr)	1,137,132	1,910,248	1,538,546

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.5	26.9	32.4
NSE VIX	24.2	25.2	33.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,640	(0.0) %	18.8 %	Energy	15,309	(0.8) %	42.1 %
IT	18,072	0.4 %	50.0 %	Pharma	11,149	3.6 %	58.7 %
Metals	2,147	0.6 %	38.2 %	Finance	10,729	(0.6) %	20.0 %
Auto	7,280	(0.1) %	56.3 %	PSU	1,412	1.4 %	10.0 %
FMCG	30,872	0.6 %	17.1 %	Real Estate	201	1.4 %	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>
Torrent Ph	2,664	9.3 %	36.0 %	H P C L	215	(3.6) %	16.8 %
Piramal En	1,473	7.5 %	57.3 %	NMDC	84	(3.5) %	6.7 %
Aurobindo	875	6.6 %	122.9 %	Adani Tran	236	(3.5) %	24.5 %
Cadila Hea	388	6.2 %	47.2 %	Eicher Mot	20,639	(2.7) %	58.7 %
Grasim Ind	633	5.0 %	33.0 %	Muthoot Fi	1,274	(2.2) %	110.7 %

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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