



03 Aug.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,885	0.8 %	6.8 %
BSE SENSEX	52,951	0.7 %	5.8 %
CNX BANK	34,710	0.4 %	2.5 %
CNX MIDCAP	28,250	1.6 %	17.1 %
CNX SMALLCAP	10,617	0.9 %	28.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,838	(0.3) %	13.8 %
S&P 500	4,387	(0.2) %	16.8 %
FTSE 100	7,082	0.7 %	7.8 %
HANG SENG	26,236	1.1 %	(4.5) %
NIKKEI	27,781	1.8 %	1.9 %
SHANGHAI COMPOSITE	3,464	2.0 %	(1.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.12	(0.2) %	1.6 %
EUR/USD	1.19	0.5 %	(3.2) %
GBP/USD	1.39	0.5 %	2.2 %
USD/JPY	109.68	(0.3) %	6.3 %
USD/AUD	1.35	(0.5) %	4.3 %
USD/SGD	1.35	(0.4) %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	0.4 %	55.3 %
Gold(INR/10g)	47,849	(0.8) %	(6.2) %
Gold Comex(USD/oz)	1,817	(1.0) %	(6.8) %
SILVER(INR/1Kg)	67,871	(0.2) %	(1.4) %
Aluminium(USD/MT)	2,624	2.6 %	30.3 %
Copper(USD/MT)	9,748	(0.3) %	23.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.2	(0.0) %	0.3 %

Global Economy: The pace of growth in US manufacturing activity slowed in the month of July, according to a report released by the Institute for Supply Management on Monday. The ISM said its manufacturing PMI dipped to 59.5 in July from 60.6 in June. The US Commerce Department construction spending rose by 0.1% to an annual rate of \$1.552 trillion in June after edging down by 0.2% to a revised rate of \$1.551 trillion in May. China manufacturing sector continued to expand in July, with a manufacturing Purchasing Managers' Index or PMI score of 50.3, the latest survey from Caixin showed on Monday. That's down from 51.3 in June, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. A key factor weighing on the headline reading was a renewed fall in total new business during July. Though only marginal, it marked the first decline in sales for 14 months. The euro area manufacturing sector growth moderated in July but the pace of expansion remained elevated, final data from IHS Markit showed on Monday. The final factory PMI fell to 62.8 from 63.4 in June. This was the lowest reading since March. But the reading was above the flash 62.6 and the sector has recorded successive months of expansion since July 2020. Japan manufacturing sector continued to expand in July, and at a faster pace, the latest survey from Jibun Bank showed on Monday with a manufacturing PMI score of 53.0. That's up from 52.4 in June, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Australia manufacturing sector continued to expand in July with a PMI score of 60.8, the latest survey from the Australian Industry Group showed on Monday. That's down from 63.2 in June.

Global Equities: The US stocks saw choppy moves as investors focused on government infrastructure spending and corporate earnings.

Indian Economy: India's manufacturing activity witnessed a rebound in last month after a steep contraction in June. According to the monthly IHS Markit India Manufacturing Purchasing Managers' Index (PMI) survey, manufacturing PMI stood at 55.3 in July, up from 48.1 in June and 50.8 in May. In the previous month, the index fell below the critical 50.0 mark for the first time since July 2020. A print above 50 means expansion while a score below 50 denotes contraction. The new export orders expanded sharply in July, following a moderate contraction in June. India's merchandise exports surged in July, rising by around 48% as compared to July, 2020. Imports also moved up 46.4%.

Equity Markets: Benchmark indices closed with strong gains on Monday amid positive global sentiment. The undertone of the market was bullish after GST collection for July crossed Rs 1 lakh crore mark. The Nifty closed below 15,900 level. All sectoral indices on the NSE closed in the green with realty, auto and FMCG leading the way.

Corporate News: Tata Motors on Monday said it has increased prices of its passenger vehicles by 0.8% with effect from August 3. Punjab National Bank reported higher standalone profit at Rs 1,023.46 crore in Q1FY22 against Rs 308.45 crore in Q1FY21. Its net interest income increased to Rs 7,226.58 crore from Rs 6,781.55 crore YoY. RBL Bank reported standalone loss of Rs 459.47 crore in Q1FY22 against profit of Rs 141.22 crore in Q1FY21. Its net interest income fell to Rs 969.50 crore from Rs 1,041.30 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(343.9)	(81.2)	(12.0)
MF(INR cr)	1,000.4	771.8	339.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	71,923	71,923	72,522
F&O(INR cr)	2,858,026	2,858,026	4,730,861

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.2	17.2	17.8
NSE VIX	12.8	12.8	17.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,710	0.4 %	2.5 %	Energy	19,229	1.6 %	3.9 %
IT	30,803	1.1 %	18.6 %	Pharma	14,475	0.3 %	16.9 %
Metals	5,781	0.2 %	38.0 %	Finance	16,540	0.4 %	4.0 %
Auto	10,183	1.3 %	1.6 %	PSU	2,462	0.8 %	11.2 %
FMCG	36,200	0.4 %	3.8 %	Real Estate	418	4.8 %	24.4 %

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>
Piramal En	2,490	7.4 %	39.9 %	UPL	791	(2.2) %	21.0 %
H P C L	273	4.5 %	14.8 %	Marico	536	(2.0) %	31.5 %
DLF	352	4.2 %	20.6 %	Tata Steel	1,410	(1.7) %	63.4 %
Abbott Ind	19,751	3.9 %	31.8 %	Colgate-Pa	1,678	(1.6) %	7.4 %
Vedanta	313	3.8 %	35.5 %	ICICI Lomb	1,455	(1.4) %	1.2 %

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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