



04 Aug.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 10,943 | 0.5 % | 32.6 % |
| BSE SENSEX | 36,940 | (1.8) % | 31.2 % |
| CNX BANK | 21,072 | 0.0 % | 15.7 % |
| CNX MIDCAP | 15,469 | 0.0 % | 34.9 % |
| CNX SMALLCAP | 5,062 | 0.0 % | 43.0 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 26,664 | 0.9 % | (6.6) % |
| S&P 500 | 3,295 | 0.7 % | 2.0 % |
| FTSE 100 | 6,033 | 2.3 % | (20.7) % |
| HANG SENG | 24,458 | (0.6) % | (14.3) % |
| NIKKEI | 22,195 | 2.2 % | (4.4) % |
| SHANGHAI COMPOSITE | 3,368 | 1.8 % | 9.2 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 74.66 | 0.1 % | 4.9 % |
| EUR/USD | 1.18 | (0.1) % | 5.0 % |
| GBP/USD | 1.31 | 0.5 % | (0.8) % |
| USD/JPY | 105.93 | 0.9 % | (2.5) % |
| USD/AUD | 1.40 | 0.3 % | (1.8) % |
| USD/SGD | 1.37 | 0.0 % | 2.1 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 40 | (6.2) % | (34.2) % |
| Gold(INR/10g) | 53,615 | 0.0 % | 37.5 % |
| Gold Comex(USD/oz) | 1,974 | (0.4) % | 28.0 % |
| SILVER(INR/1Kg) | 63,877 | 0.0 % | 38.7 % |
| Aluminium(USD/MT) | 1,680 | (0.4) % | (5.2) % |
| Copper(USD/MT) | 6,441 | (0.1) % | 4.5 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 0.6 | 0.0 % | (1.4) % |

Global Economy: The Institute for Supply Management on Monday showed a sharp acceleration in the pace of growth in US manufacturing activity in the month of July. The ISM said its purchasing managers index or PMI rose to 54.2 in July from 52.6 in June, with a reading above 50 indicating growth in manufacturing activity. China manufacturing sector continued to expand in July with a manufacturing PMI score of 52.8, the latest survey from Caixin revealed on Monday, up sharply from 51.2 in June. Supporting the higher PMI figure was a steeper increase in production across Chinese manufacturing firms. Output expanded for the fifth month in a row, and at the fastest rate for nine-and-a-half years, with many companies citing greater client demand amid a further recovery in market conditions following the COVID-19 outbreak. Euro area manufacturing PMI returned to growth in July for the first time in a year-and-a-half, final data from IHS Markit showed Monday. Manufacturing PMI rose to 51.8 in July from 47.4 in June. Both production and new orders returned to growth in July. UK manufacturing PMI rose to a 16-month high of 53.3 in July from 50.1 in June, final data from IHS Markit showed. Japan manufacturing sector continued to contract in July, with a manufacturing PMI score of 45.2, the latest survey from Jibun Bank showed on Monday. That's up from 40.1 in June, although it remains beneath the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: DOW edged up as traders eyed earnings and the relief bill talks gathered steam.

Indian Economy: India's manufacturing output in July contracted at a faster pace than in June. The IHS Markit purchasing managers' index (PMI) for manufacturing declined fell slightly in July to 46 from 47.2 in June. A figure of above 50 indicates expansion, while a sub-50 print signals contraction. Subdued demand was evidenced by marked decrease in new orders placed with manufacturers in July. Similar to the trend for output, the pace of decline accelerated from June, but remained slower than at the height of the current crisis. The number of payments transacted on Unified Payments Interface (UPI) hit an all-time high of 149 crore in July this year, with the value of transactions reaching Rs 2.91 lakh crore, NPCI data showed.

Equity Markets: The barometer index, the S&P BSE Sensex slumped 667.29 points or 1.77% at 36,939.60. The Nifty 50 index lost 173.60 points or 1.57% at 10,899.85. The Nifty declined 3.55% in four sessions. Private banks witnessed massive selling.

Corporate News: Local oil marketing companies could be in focus as WTI Crude surged nearly 1.50% yesterday. Exide Industries reported net loss of Rs 13.56 crore in Q1FY20 against a profit of Rs 161.58 crore while the company's revenue slipped down 31.% at Rs 2,526.11 crore versus Rs 3,664.18 crore on yoy basis. KEC International said that the company has secured new orders of Rs 1,192 crore across its various businesses. Local mining counters could be in focus following a spirited rally in COMEX Copper which firmed up from a three week low.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (122.4) | 50.1 | 65.6 |
| MF(INR cr) | (1,509.3) | (427.9) | (140.2) |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 73,830 | 73,830 | 55,525 |
| F&O(INR cr) | 1,081,113 | 1,081,113 | 1,533,035 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 24.3 | 24.3 | 32.3 |
| NSE VIX | 25.2 | 25.2 | 33.4 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 21,072 | (2.6) % | 15.7 % | Energy | 15,056 | (1.7) % | 39.8 % |
| IT | 17,966 | (0.6) % | 49.1 % | Pharma | 11,128 | (0.2) % | 58.4 % |
| Metals | 2,156 | 0.4 % | 38.8 % | Finance | 10,467 | (2.4) % | 17.0 % |
| Auto | 7,240 | (0.5) % | 55.5 % | PSU | 1,421 | 0.6 % | 10.7 % |
| FMCG | 30,760 | (0.4) % | 16.7 % | Real Estate | 199 | (1.2) % | 15.4 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Tata Motor | 113 | 8.0 % | 66.4 % | Bandhan Ba | 309 | (10.5) % | 58.4 % |
| Titan Comp | 1,077 | 3.3 % | 15.1 % | UPL | 452 | (5.4) % | 47.9 % |
| Abbott Ind | 16,009 | 3.0 % | 2.5 % | Kotak Mah. | 1,309 | (4.2) % | 10.7 % |
| Punjab Nat | 33 | 3.0 % | 8.0 % | SBI Life I | 875 | (4.1) % | 37.8 % |
| Motherson | 98 | 3.0 % | 68.6 % | IndusInd B | 503 | (4.0) % | 47.0 % |

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 | | | | | |

..... End of Report