



05 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,095	1.9 %	34.4 %
BSE SENSEX	37,688	2.0 %	33.3 %
CNX BANK	21,491	2.0 %	18.0 %
CNX MIDCAP	15,640	1.1 %	36.3 %
CNX SMALLCAP	5,132	1.4 %	44.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,828	0.6 %	(6.0) %
S&P 500	3,307	0.4 %	2.3 %
FTSE 100	6,036	0.1 %	(20.6) %
HANG SENG	24,947	2.0 %	(12.6) %
NIKKEI	22,574	1.7 %	(2.7) %
SHANGHAI COMPOSITE	3,372	0.1 %	9.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.89	0.4 %	5.2 %
EUR/USD	1.18	(0.7) %	4.8 %
GBP/USD	1.31	(0.4) %	(0.9) %
USD/JPY	106.01	0.9 %	(2.4) %
USD/AUD	1.41	0.9 %	(1.5) %
USD/SGD	1.38	0.3 %	2.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	42	3.6 %	(31.8) %
Gold(INR/10g)	53,772	0.3 %	37.9 %
Gold Comex(USD/oz)	2,024	2.5 %	31.2 %
SILVER(INR/1Kg)	64,419	0.8 %	39.9 %
Aluminium(USD/MT)	1,710	1.8 %	(3.5) %
Copper(USD/MT)	6,440	(0.0) %	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	0.5	(0.1) %	(1.4) %

Global Economy: A report released by the Commerce Department on Tuesday showed another substantial increase in new orders for U.S. manufactured goods in the month of June. The Commerce Department said factory orders soared by 6.2% in June after skyrocketing by a revised 7.7% in May. Euro area industrial producer prices increased for the first time in five months in June though economic activity remained damped by the Covid-19 containment measures in most of the countries in the EU, preliminary data from Eurostat showed on Tuesday. The producer price index for Eurozone rose 0.7% from May, when it slipped 0.6%. This was the first increase in producer prices since January. Australia's central bank maintained its interest rate at a record low and quantitative easing unchanged as the package unveiled in March is supporting the economy as expected. The board of Reserve Bank of Australia, governed by Philip Lowe, decided to maintain cash rate and the targeted yield on three-year government bonds of 25 basis points.

Global Equities: US stocks stayed supported in cautious trades while some selling was seen in European equities.

Indian Economy: Apex IT industry body Nasscom said that US President Donald Trump's executive order on Federal contracting & hiring practices appears to be based on misperceptions & misinformation and noted that the order comes at a time when there is a huge shortage of STEM skills in the US. Part of the executive order focusses on Federal Contracting and part of it on H -1B visa programme. The Finance Ministry noted in a latest monthly update that with India unlocking, the worst seems to be over for the economy as high-frequency indicators show an improvement from the unprecedented trough the economy had hit in April 2020. The Reserve Bank of India (RBI) has released Lending Rates of scheduled commercial banks. According to the RBI, the Weighted Average Lending Rates (WALR) on fresh rupee loans sanctioned stood at 8.35% in June compared to 8.54% in May for scheduled commercial banks (SCB).

Equity Markets: Key domestic benchmarks surged on Tuesday, snapping their four-day losing streak. Rally in private banks pushed the indices higher. Firmness in other Asian indices boosted sentiment. The barometer index, the S&P BSE Sensex jumped 748.31 points or 2.03% at 37,687.91. The Nifty 50 index rallied 203.65 points or 1.87% at 11,095.25. The Nifty declined 3.55% in the previous four sessions.

Corporate News: A sharp spurt in crude oil prices in last session could keep the local oil marketing companies shares under check today. The Insurance Regulatory and Development Authority of India (IRDAI) issued a circular exempting the life insurance companies from the requirement of issuing policy document and copy of proposal form in physical form, subject to certain conditions. NMDC, the largest domestic iron-ore producer reported a 13% rise in production in July 2020 while sales grew 7% during the month compared to the corresponding period in July 2019. Gujarat Gas reported Q1FY21 profit at Rs 59 crore versus Rs 234 crore yoy while revenue came in at Rs 1,107.4 crore versus Rs 2,671 crore yoy.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1,003.5	1,003.5	77.1
MF(INR cr)	(266.4)	(266.4)	(137.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	62,098	67,964	55,604
F&O(INR cr)	1,446,632	1,263,872	1,532,006

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.8	24.0	32.2
NSE VIX	23.8	24.5	33.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,491	2.0 %	18.0 %	Energy	15,408	2.3 %	43.0 %
IT	17,808	(0.9) %	47.8 %	Pharma	11,317	1.7 %	61.1 %
Metals	2,177	1.0 %	40.2 %	Finance	10,706	2.3 %	19.7 %
Auto	7,354	1.6 %	57.9 %	PSU	1,420	(0.0) %	10.7 %
FMCG	30,902	0.5 %	17.2 %	Real Estate	202	1.9 %	17.5 %

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>
Reliance I	2,151	7.0 %	100.9 %	Tech Mahin	653	(3.1) %	27.7 %
Zee Entert	143	6.2 %	18.6 %	Shriram Tr	655	(2.4) %	7.7 %
HDFC Bank	1,042	4.0 %	25.6 %	B P C L	409	(2.2) %	34.9 %
Torrent Ph	2,829	3.7 %	44.4 %	IndusInd B	493	(2.1) %	43.9 %
SBI Cards	757	3.6 %	24.5 %	HCL Techno	693	(1.9) %	67.5 %

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