



05 Aug.2021

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 16,259 | 0.8 % | 9.4 % |
| BSE SENSEX | 54,370 | 1.0 % | 8.7 % |
| CNX BANK | 36,028 | 2.3 % | 6.4 % |
| CNX MIDCAP | 27,928 | (1.2) % | 15.8 % |
| CNX SMALLCAP | 10,485 | (1.0) % | 26.6 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| DOW JONES | 34,793 | (0.9) % | 13.7 % |
| S&P 500 | 4,403 | (0.5) % | 17.2 % |
| FTSE 100 | 7,124 | 0.3 % | 8.4 % |
| HANG SENG | 26,427 | 0.9 % | (3.8) % |
| NIKKEI | 27,584 | (0.2) % | 1.2 % |
| SHANGHAI COMPOSITE | 3,477 | 0.9 % | (0.7) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 74.21 | 0.1 % | 1.7 % |
| EUR/USD | 1.19 | 0.1 % | (3.2) % |
| GBP/USD | 1.39 | 0.0 % | 1.8 % |
| USD/JPY | 109.50 | (0.2) % | 6.1 % |
| USD/AUD | 1.36 | (0.2) % | 4.8 % |
| USD/SGD | 1.35 | (0.1) % | 2.4 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 71 | (1.0) % | 48.2 % |
| Gold(INR/10g) | 47,852 | 0.0 % | (6.2) % |
| Gold Comex(USD/oz) | 1,817 | 5.7 % | (6.8) % |
| SILVER(INR/1Kg) | 68,085 | 0.6 % | (1.1) % |
| Aluminium(USD/MT) | 2,596 | (1.5) % | 28.9 % |
| Copper(USD/MT) | 9,584 | (1.6) % | 21.0 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 1.2 | 0.0 % | 0.3 % |

Global Economy: The ISM said its services PMI surged to an all-time high of 64.1 in July after pulling back to 60.1 in June, with a reading above 50 indicating growth in the sector. Payroll processor ADP released a report on Wednesday showing private sector rose by 330,000 jobs in July after surging by a downwardly revised 680,000 jobs in June. The services sector in China continued to expand in July, the latest survey from Caixin showed on Wednesday with a services PMI score of 54.9. This was up from 50.3 and it moved further above the boom-or-bust line of 50 that separates expansion from contraction. The survey highlighted a further rise in new business. The rate of new order growth quickened from June's recent low and was steep overall. The euro area private sector expanded the most in more than 15 years in July, underpinned by steep manufacturing output growth and an accelerated expansion of services activity, final data from IHS Markit showed on Wednesday. The composite output index rose to 60.2 in July from 59.5 in the previous month. However, the reading was below the flash score of 60.6. Eurozone retail sales grew at a slower pace in June largely due to the fall in food sales, data from Eurostat showed on Wednesday. Retail sales grew 1.5% on a monthly basis, slower than the 4.1% increase in May. The services sector in Japan continued to contract in July, the latest survey from Jibun Bank showed on Wednesday with a services PMI score of 47.4. That's down from 48.0 in June and it moves further beneath the boom-or-bust line of 50 that separates expansion from contraction. The total value of retail sales in Australia slipped by a seasonally adjusted 1.8% on month in June, the Australian Bureau of Statistics said on Wednesday - coming in at A\$30.590 billion. This followed a 0.4% increase in May.

Global Equities: The US stocks tumbled from record highs on easing jobs growth and lack of fresh buying support.

Indian Economy: IHS Markit India Services PMI came at 45.4 in July 2021. The index was in contraction territory for the third month in a row. However, the index rose from 41.2 posted in June. Panel members that reported lower output cited subdued demand conditions amid the COVID-19 crisis. India's COVID-19 vaccination coverage has crossed a landmark of 48 Cr. Cumulatively, 48,52,86,570 vaccine doses have been administered through 56,83,682 sessions, as per the provisional report till 7 am today. 62,53,741 vaccine doses were administered in the last 24 hours.

Equity Markets: Benchmark indices rallied for third consecutive trading day to register another record closing high. The Nifty ended above the 16,250 level amid heavy buying in banks and financial stocks. Meanwhile, the Sensex scaled record high of 54,465.91. S&P BSE Sensex, was up 546.41 points or 1.02% at 54,369.63. The Nifty 50 index gained 128.05 points or 0.79% at 16,258.80. The broader market underperformed the frontliners with the BSE Mid Cap falling 1.05% and the BSE Small Cap declining 1.06%.

Corporate News: Reliance Industries is doubling its PET recycling capacity by setting up a recycled polyester staple fiber (PSF) manufacturing facility in Andhra Pradesh. The move is part of RIL's commitment to lead the industry on circular economy, enhance its sustainability quotient and bolster the entire polyester and polymer value chain. HPCL company reported lower profit at Rs 1,795 crore in Q1FY22 against Rs 3,018 crore in Q4FY21. The revenue fell to Rs 72,443.4 crore from Rs 74,843.4 crore QoQ. Apollo Tyres company reported profit at Rs 127.7 crore in Q1FY22 against loss of Rs 134.5 crore in Q1FY21. The revenue jumped to Rs 4,584.4 crore from Rs 2,881.7 crore YoY.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 282.4 | 41.2 | (10.7) |
| 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) | 83,005 | 76,304 | 72,664 |
| F&O(INR cr) | 7,167,865 | 4,912,050 | 4,759,289 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 19.5 | 18.9 | 17.9 |
| NSE VIX | 13.2 | 13.3 | 17.0 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 36,028 | 2.3 % | 6.4 % | Energy | 19,405 | 0.1 % | 4.8 % |
| IT | 30,977 | (0.6) % | 19.2 % | Pharma | 14,594 | (0.4) % | 17.9 % |
| Metals | 5,760 | (0.3) % | 37.5 % | Finance | 17,253 | 2.6 % | 8.4 % |
| Auto | 10,247 | (0.9) % | 2.2 % | PSU | 2,498 | 0.3 % | 12.8 % |
| FMCG | 36,482 | (0.9) % | 4.6 % | Real Estate | 412 | (1.7) % | 22.6 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| HD F C | 2,676 | 4.8 % | 5.7 % | Indus Towe | 207 | (7.0) % | (19.0) % |
| Kotak Mah. | 1,750 | 3.8 % | (3.0) % | Abbott Ind | 18,030 | (6.4) % | 20.4 % |
| ICICI Bank | 715 | 3.5 % | 20.2 % | Dabur Indi | 588 | (4.3) % | 9.2 % |
| ICICI Pru | 670 | 2.9 % | 50.7 % | Alkem Lab | 3,399 | (3.1) % | 22.5 % |
| St Bk of I | 457 | 2.3 % | 23.3 % | Godrej Con | 989 | (2.8) % | 36.2 % |

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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