



06 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,607	0.5 %	28.5 %
BSE SENSEX	36,021	0.5 %	27.4 %
CNX BANK	21,852	(0.5) %	20.0 %
CNX MIDCAP	15,043	0.7 %	31.1 %
CNX SMALLCAP	4,706	0.2 %	32.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,827	0.4 %	(9.5) %
S&P 500	3,130	0.5 %	(3.1) %
FTSE 100	6,157	(1.3) %	(19.0) %
HANG SENG	25,373	1.0 %	(11.1) %
NIKKEI	22,306	0.7 %	(3.9) %
SHANGHAI COMPOSITE	3,153	2.0 %	2.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.34	(0.5) %	4.4 %
EUR/USD	1.12	(0.2) %	0.2 %
GBP/USD	1.25	(0.2) %	(5.5) %
USD/JPY	107.51	0.0 %	(1.0) %
USD/AUD	1.44	(0.2) %	1.1 %
USD/SGD	1.39	0.1 %	3.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	3.5 %	(33.6) %
Gold(INR/10g)	48,227	0.1 %	23.7 %
Gold Comex(USD/oz)	1,789	0.0 %	16.0 %
SILVER(INR/1Kg)	48,458	0.2 %	5.2 %
Aluminium(USD/MT)	1,582	(1.2) %	(10.8) %
Copper(USD/MT)	6,023	(0.9) %	(2.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	0.0 %	(1.3) %

Global Economy: Eurozone service sector continued to rebound from the coronavirus induced steep decline, according to the latest data released by IHS Markit on Friday. The IHS Markit Eurozone Services Business Activity Index rose to 48.3 from the 30.5 recorded in May, hitting its highest level since February before the pandemic hurt the economic activities. The IHS Markit Eurozone PMI Composite Output Index also rebounded for a second consecutive month. At 48.5, the index is up nearly 17 points since May's reading. While confidence in the future has improved, it remains well below levels seen at the start of the year. Germany Services PMI Business Activity Index came in at 47.3 in June, 14.7 index points higher in comparison to the previous month, according to a report by IHS Markit published on Friday. This marked the highest in four months. Meanwhile, Germany Composite Output Index increased by 14.7 index points to reach 47. UK services PMI climbed to 47.1 in June from 29 in May. The flash for June was 47. The latest reading was the highest in four months and well above April's record low of 13.4. UK consumer sentiment rose at the end of June, according to the flash survey conducted by the market research group GfK. The consumer sentiment index rose three points to -27 over the last two weeks of June. The June reading was -30. Australia's service sector rose for the first time in five months in June amid a further easing of Covid-19 restrictions, survey data from IHS Markit showed Friday. The Commonwealth Bank of Australia services Purchasing Managers' Index surged to 53.1 in June from 26.9 in May. The latest expansion was the fastest for just over one-and-a-half years. Australia's composite output index also improved to 52.7 in June from 28.1 a month ago.

Global Equities: European stocks closed lower on Friday on concerns over a spike in US coronavirus infections. The US markets were closed for Independence Day Holiday.

Indian Economy: India's services sector witnessed some recovery as the nation eased the restrictions imposed to contain the coronavirus pandemic. The India Services Business Activity Index, compiled by IHS Markit, stood at 33.7 in June compared with 12.6 in May, according to a media statement. India Composite PMI Output Index, measuring combined services and manufacturing output, rose to 37.8 in June from 14.8 in May. Still, it remains below the crucial 50.0 level. Indian banking sector's exposure to the MSME sector contracted by more than Rs 35,000 crore from Rs 4.8 lakh crore in March to Rs 4.5 lakh crore in May, latest Reserve Bank of India (RBI) data on sectoral credit deployment showed.

Equity Markets: The Sensex and the Nifty ended with modest gains after a volatile session on Friday. IT and auto shares advanced while banks corrected. As per provisional closing, the barometer S&P BSE Sensex rallied 177.72 points or 0.5% at 36,021.45. The Nifty 50 index surged 55.65 points or 0.53% at 10,607.35.

Corporate News: IT counters could be under pressure as Indian Rupee firmed up last week. While the stock markets jumped to around four month high, the INR also soared to a three and half month high of 74.62 per US dollar on Friday. Adani Ports and Special Economic Zone stated that the company achieved a throughput of 41.5 MMT across its nine operating ports in India in Q1FY21. National Fertilizers will be in focus as the company achieved highest-ever fertilizer sale of 12.85 lakh MT in Q1FY21, up about 21.5% YoY. FMCG major Marico said it remains cautiously optimistic about the future as it unfolds, however much will depend on the extent of the spread of COVID-19 in India and overseas and how the on-ground environment evolves.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(43.9)	(133.4)	64.9
MF(INR cr)	758.1	758.1	(21.6)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	51,879	53,723	52,870
F&O(INR cr)	792,884	1,970,172	1,421,542

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.7	28.0	34.1
NSE VIX	25.8	26.8	36.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,852	(0.5) %	20.0 %	Energy	14,771	1.0 %	37.1 %
IT	15,286	1.1 %	26.9 %	Pharma	9,963	0.2 %	41.8 %
Metals	2,009	(0.4) %	29.3 %	Finance	10,871	(0.3) %	21.6 %
Auto	6,971	0.9 %	49.7 %	PSU	1,464	(0.9) %	14.1 %
FMCG	30,529	0.7 %	15.8 %	Real Estate	203	1.0 %	18.0 %

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>
Siemens	1,149	5.0 %	5.9 %	Motherson	98	(5.4) %	69.3 %
HDFC Life	572	4.4 %	33.1 %	JSW Steel	191	(1.8) %	33.5 %
Petronet L	273	4.4 %	36.4 %	United Bre	1,037	(1.7) %	16.6 %
Bharti Air	581	4.1 %	38.0 %	Bajaj Hold	2,547	(1.5) %	45.1 %
Adani Port	360	3.9 %	47.2 %	IndusInd B	487	(1.5) %	42.4 %

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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