



06 Jul.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,821	(0.1) %	6.4 %
BSE SENSEX	52,880	0.8 %	5.7 %
CNX BANK	35,212	0.0 %	4.0 %
CNX MIDCAP	27,163	0.0 %	12.6 %
CNX SMALLCAP	9,981	0.0 %	20.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,786	0.4 %	13.7 %
S&P 500	4,352	0.8 %	15.9 %
FTSE 100	7,165	0.6 %	9.0 %
HANG SENG	28,144	(0.6) %	2.4 %
NIKKEI	28,598	(0.6) %	4.9 %
SHANGHAI COMPOSITE	3,534	0.4 %	0.9 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.33	0.2 %	1.9 %
EUR/USD	1.19	(0.1) %	(3.3) %
GBP/USD	1.38	(0.1) %	1.3 %
USD/JPY	111.04	0.3 %	7.6 %
USD/AUD	1.33	(0.2) %	2.5 %
USD/SGD	1.35	0.2 %	2.0 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	75	0.0 %	57.8 %
Gold(INR/10g)	47,272	(0.3) %	(7.3) %
Gold Comex(USD/oz)	1,801	0.8 %	(7.6) %
SILVER(INR/1Kg)	69,525	0.9 %	1.0 %
Aluminium(USD/MT)	2,540	0.8 %	26.1 %
Copper(USD/MT)	9,432	1.5 %	19.1 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.4	0.0 %	0.5 %

**Global Economy:** China Caixin Services PMI fell to a 14-month low of 50.3 in June 2021 from 55.1 in the prior month, amid an uptick in local COVID-19 cases and travel restrictions. It held just above the 50-mark, which separates growth from contraction on monthly basis. The Composite Output Index dropped from 53.8 in May to 50.6 in June, signaled a weakening services sector expansion. The eurozone private sector economy expanded at its fastest rate for 15 years during June, underpinned by surging levels of output across both manufacturing and service sectors. After accounting for seasonal factors, the HIS Markit Eurozone PMI Composite Output Index recorded a reading of 59.5, up from 57.1 in May. The IHS Markit Eurozone PMI Services Business Activity Index remained comfortably above the 50.0 no-change mark during June, reaching its highest level since July 2007. After accounting for seasonal factors, the index recorded 58.3, up from 55.2 and signalling growth for a third successive month. The headline seasonally adjusted IHS Markit/CIPS UK Services PMI Business Activity Index registered 62.4 in June, down slightly from 62.9 in May. This was the second-highest reading since October 2013 and above the earlier 'flash' figure of 61.7 in June. The index has posted above the 50.0 no-change value for four months in a row. Moreover, the average reading for the second quarter of 2021 (62.1) was the highest for any quarter in the past 24 years. Japanese services companies continued to report that business conditions were disrupted by the latest wave of COVID-19 infections at the end of the second quarter of 2021. Activity and incoming business experienced further contractions as restrictions introduced to curb the spread of the disease remained in place through much of June.

**Global Equities:** European markets edged up on supportive economic cues. US stock markets were closed for the Independence Day holiday.

**Indian Economy:** India services firms endured further losses of new business as the emergence of the pandemic and the reintroduction of containment measures restricted demand. New work intakes and output contracted at the fastest rates since July 2020, which prompted companies to reduce employment again. Business sentiment took another hit, with panellists neutral in their assessments of output forecasts for the year ahead. Registering 41.2 in June, the seasonally adjusted India Services Business Activity Index highlighted a further contraction in output. Moreover, falling from 46.4 in May, the latest reading pointed to the fastest rate of reduction since July 2020.

**Equity Markets:** The main indices ended at the day's high with decent gains on Monday. The Nifty managed to close near the 15,850 level. IT and pharma shares corrected while banks, metals and realty shares were in demand.

**Corporate News:** Maruti Suzuki India said that the company produced 1,65,576 units in June 2021, against 50,742 units of production in June 2020. Production in June 2020 was far from normal owing to Covid-19 related lockdowns and disruptions. NMDC said that the Government of India, the promoter, proposes to sell up to 11,72,24,234 equity shares in the company (representing 4% of the total paid-up equity), with an option to additionally sell 10,22,78,144 equity shares (representing 3.49% of the total paid-up equity) in case of oversubscription, via offer for sale, on July 6-7. The floor price for the offer shall be Rs. 165 per share. Force Motors said that production of commercial vehicles, utility vehicles and tractors stood at 1,757 units in June 2021.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(335.6)	(175.5)	6.8
MF(INR cr)	(20.2)	(85.2)	110.8

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	63,650	62,092	73,483
F&O(INR cr)	2,716,897	4,573,281	4,537,501

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.5	15.5	17.9
NSE VIX	12.1	12.3	18.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,212	1.2 %	4.0 %	Energy	19,790	0.5 %	6.9 %
IT	28,951	(0.2) %	11.4 %	Pharma	14,529	(0.0) %	17.4 %
Metals	5,190	1.2 %	23.9 %	Finance	16,611	1.0 %	4.4 %
Auto	10,746	0.6 %	7.2 %	PSU	2,545	0.9 %	14.9 %
FMCG	36,391	0.5 %	4.3 %	Real Estate	354	2.7 %	5.4 %

### 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>
Muthoot Fi	1,559	5.5 %	28.3 %	Adani Tran	908	(5.0) %	(9.1) %
Pidilite I	2,267	4.1 %	24.4 %	Adani Gree	965	(5.0) %	(16.9) %
Vedanta	272	4.0 %	17.8 %	NMDC	175	(4.2) %	26.6 %
Godrej Con	925	3.8 %	27.4 %	Adani Ente	1,394	(1.9) %	25.9 %
Havells In	1,022	3.7 %	(3.4) %	HDFC Life	678	(1.4) %	(1.9) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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