



06 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,184	0.7 %	35.5 %
BSE SENSEX	37,663	(0.1) %	34.3 %
CNX BANK	21,510	0.0 %	18.1 %
CNX MIDCAP	15,726	0.0 %	37.1 %
CNX SMALLCAP	5,189	0.0 %	46.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,202	1.4 %	(4.7) %
S&P 500	3,328	0.6 %	3.0 %
FTSE 100	6,105	1.1 %	(19.7) %
HANG SENG	25,103	0.6 %	(12.1) %
NIKKEI	22,515	(0.3) %	(3.0) %
SHANGHAI COMPOSITE	3,378	0.2 %	9.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.89	0.3 %	5.2 %
EUR/USD	1.18	(0.0) %	5.0 %
GBP/USD	1.31	(0.2) %	(1.0) %
USD/JPY	105.95	0.0 %	(2.5) %
USD/AUD	1.40	0.0 %	(1.8) %
USD/SGD	1.38	0.0 %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	42	1.2 %	(31.0) %
Gold(INR/10g)	55,230	2.7 %	41.6 %
Gold Comex(USD/oz)	2,050	1.3 %	32.9 %
SILVER(INR/1Kg)	70,994	10.2 %	54.2 %
Aluminium(USD/MT)	1,739	1.7 %	(1.9) %
Copper(USD/MT)	6,526	1.3 %	5.8 %

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 US ISM said its non-manufacturing index edged up to 58.1 in July after spiking to 57.1 in June, with a reading above 50 indicating growth in service sector activity. The Commerce Department said the trade deficit narrowed to \$50.7 billion in June from a revised \$54.8 billion in May. ADP said US private sector employment rose by 167,000 jobs in July after soaring by an upwardly revised 4.314 million jobs in June. China services sector continued to expand in July, with a PMI score of 54.1, the latest survey from Caixin revealed on Wednesday. That's down from the 10-year high of 58.4 in June, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. Mild capacity pressures were signaled by the latest data, as backlogs of work increased for a second month in succession. Growth was linked by panelists to the latest gains in incoming new work. Also, the composite PMI came in at 54.5, down from 55.7 in the previous month. Eurozone retail sales increased 5.7% on a monthly basis, following a 20.3% increase in May, data from Eurostat showed Wednesday. Turnover had logged double-digit contractions amid the coronavirus pandemic during March and April. Food, drinks and tobacco turnover was down 2.7%, while non-food product sales advanced 12.1 percent in June. Sales of automotive fuel in specialized stores grew 20.4% in June. On a yearly basis, retail sales gained unexpectedly by 1.3%, in contrast to a 3.1% drop in May. Japan services sector continued to contract in July, with a PMI score of 45.4, the latest survey from Jibun Bank showed on Wednesday. That's up from 45.0 in June, although it remains beneath the boom-or-bust line of 50 that separates expansion from contraction. Australia's service sector activity gained momentum in July. The Commonwealth Bank of Australia final services Purchasing Managers' Index rose to 58.2 in July from 53.1 in June. The flash reading was 58.5. This was the highest score since April 2017. A score above 50 indicates expansion.

Global Equities: US stocks extended gains on signs of progress regarding the next coronavirus fiscal stimulus package.

Indian Economy: India's services Purchasing Managers' Index rose moderately to 34.2 in July from 33.7 in June, as restrictions imposed to curb the coronavirus disease weighed on activity, survey results from IHS Markit showed Wednesday. However, a score below 50 indicates contraction. Business activity and new work logged substantial reductions in July as lockdown restrictions stifled demand and forced companies to cease operations. Firms made further cuts to staff numbers, with the rate of job shedding the most marked on record. Looking ahead, the 12-month outlook for output was negative for a third consecutive month, with fears of a substantial economic downturn common among survey respondents. The survey showed that the composite output index, which measures combined services and manufacturing output, dropped to 37.2 from 37.8 in June.

Equity Markets: Key benchmark indices ended near flat line after a volatile session on Wednesday. Weak domestic macroeconomic data spoiled investors sentiment. The barometer index, the S&P BSE Sensex fell 24.58 points or 0.07% at 37,663.33. The Nifty 50 index rose 6.40 points or 0.06% at 11,101.65. Both these indices reversed trend after rising as much as 1.2% in morning trade.

Corporate News: Banking shares will be in focus ahead of the outcome of the RBI's monetary policy meeting on Thursday, 6 August 2020. Reliance Industries has been ranked second biggest brand after Apple on the FutureBrand Index 2020. Lupin, HPCL, Adani Enterprises, Adani Power, Vodafone Idea, Apar Industries, BASF India, Bayer Cropscience, Deepak Nitrite will be in focus of latest earnings today.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	116.6	560.1	77.5
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)	64,783	66,904	55,713
F&O(INR cr)	2,174,185	1,567,310	1,539,562

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.0	23.7	32.1
NSE VIX	23.6	24.2	33.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,510	0.1 %	18.1 %	Energy	15,328	(0.5) %	42.3 %
IT	17,870	0.3 %	48.3 %	Pharma	11,264	(0.5) %	60.3 %
Metals	2,264	4.0 %	45.7 %	Finance	10,685	(0.2) %	19.5 %
Auto	7,489	1.8 %	60.8 %	PSU	1,418	(0.2) %	10.5 %
FMCG	30,864	(0.1) %	17.1 %	Real Estate	202	0.1 %	17.6 %

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>
Hindalco I	176	8.3 %	91.8 %	Piramal En	1,433	(2.3) %	53.0 %
Tata Steel	396	6.3 %	48.6 %	Muthoot Fi	1,258	(2.2) %	108.1 %
Hindustan	219	6.1 %	36.3 %	Godrej Con	677	(2.1) %	23.4 %
Info Edg.(3,353	5.3 %	66.5 %	Pidilite I	1,315	(2.1) %	1.4 %
Eicher Mot	21,959	4.5 %	68.9 %	Cadila Hea	396	(1.9) %	50.1 %

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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