



07 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,764	0.0 %	30.4 %
BSE SENSEX	36,487	1.3 %	29.1 %
CNX BANK	22,199	0.0 %	21.9 %
CNX MIDCAP	15,297	0.0 %	33.4 %
CNX SMALLCAP	4,792	0.0 %	35.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,287	1.8 %	(7.9) %
S&P 500	3,180	1.6 %	(1.6) %
FTSE 100	6,286	2.1 %	(17.3) %
HANG SENG	26,339	3.8 %	(7.7) %
NIKKEI	22,714	1.8 %	(2.1) %
SHANGHAI COMPOSITE	3,333	5.7 %	8.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.31	(0.5) %	4.4 %
EUR/USD	1.13	0.4 %	0.8 %
GBP/USD	1.25	0.1 %	(5.3) %
USD/JPY	107.54	0.0 %	(1.0) %
USD/AUD	1.44	(0.7) %	0.6 %
USD/SGD	1.39	(0.1) %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(0.0) %	(33.6) %
Gold(INR/10g)	48,168	(0.1) %	23.5 %
Gold Comex(USD/oz)	1,794	0.3 %	16.3 %
SILVER(INR/1Kg)	49,051	1.2 %	6.5 %
Aluminium(USD/MT)	1,593	0.7 %	(10.1) %
Copper(USD/MT)	6,112	1.5 %	(0.9) %

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 %	(1.2) %

Global Economy: The Institute for Supply Management or ISM released a report on Monday showing a substantial turnaround in U.S. service sector activity in the month of June. The ISM said its non-manufacturing index spiked to 57.1 in June from 45.4 in May. Eurozone retail sales rebounded 17.8% on a monthly basis in May, in contrast to a 12.1% decline in April. On a yearly basis, retail sales dropped at a slower pace of 5.1%, following a sharp 19.6% decrease in April. Germany's factory orders advanced 10.4% month-on-month in May, reversing a sharp revised 26.2% fall posted in April, as containment measures taken to curb the spread of coronavirus were relaxed, data from Destatis revealed Monday. Domestic orders increased 12.3% and foreign orders rose 8.8% in May. On a yearly basis, manufacturing orders plunged 29.3%, slower than the 36.9% decrease posted in April. Germany's construction sector continued to contract in June led by ongoing weakness in new orders linked in part to the Covid-19 pandemic, survey data from IHS Markit showed Monday. The construction Purchasing Managers' Index rose to 41.3 in June from 40.1 in May. However, a score below 50 suggested that construction activity was still firmly in contraction territory. The private sector in Hong Kong continued to contract in June, albeit at a much slower rate, the latest survey from IHS Markey revealed on Monday with a PMI score of 49.6. That was up from 43.9 in May, although it remains beneath the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: The US stocks resumed their uptrend on consistent buying. The tech-heavy Nasdaq soared to a new record high yet again.

Indian Economy: The opening up of India's economy post lockdown and implementation of the economic package unveiled by the government have started showing results on the ground with initial signs of improvement in the performance of businesses now visible, according to the FICCI-Dhruva Advisors industry survey. The results of the survey show that presently close to 30% of the firms are operating at 70% plus capacity utilisation, while nearly 45% expect capacity utilisation to be above 70% in the near term.

Equity Markets: Domestic shares advanced for the fourth straight session on Monday, tracking positive global cues. Strength in index majors Reliance Industries (RIL) (up 3.57%), TCS (up 2.91%) and HDFC Bank (up 2.68%) powered the indices. The barometer S&P BSE Sensex rallied 465.86 points or 1.29% at 36,487.28. The Nifty 50 index surged 156.30 points or 1.47% at 10,763.65. Both these indices have risen about 4.50% in four sessions. Investors' risk appetite strengthened after the media reported that India and China have begun a slight disengagement from the face-off sites in the Galwan Valley and Gogra-Hot Springs areas of eastern Ladakh.

Corporate News: Oil PSUs are implementing about Rs 3.57 lakh crore worth of projects across the entire hydrocarbon value chain, the Petroleum Ministry said on Monday. In Twitter posts, the Ministry of Petroleum and Natural Gas said out of Rs 3.57 lakh crore being spent on 859 projects, over Rs 60,000 crore will be invested during fiscal 2020-21. Greaves Cotton will be in focus as Subsidiary Ampere Vehicles is set to acquire shares of Bestway Agencies on a fully diluted basis through secondary purchase. Shriram Transport Finance fixed the issue price at Rs 570 per share for its Rs 1,500 crore rights issue. Apollo Tyres has decided to cut its capital expenditure (capex) by Rs 400 crore this fiscal amid challenging business environment due to the coronavirus pandemic.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	83.0	(61.3)	65.2
MF(INR cr)	(814.8)	249.1	(19.3)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	57,868	54,759	52,949
F&O(INR cr)	1,030,180	1,735,174	1,415,330

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.9	28.0	34.1
NSE VIX	25.2	26.4	36.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,199	1.6 %	21.9 %	Energy	14,998	1.5 %	39.2 %
IT	15,465	1.2 %	28.4 %	Pharma	9,901	(0.6) %	40.9 %
Metals	2,058	2.5 %	32.5 %	Finance	11,024	1.4 %	23.3 %
Auto	7,172	2.9 %	54.0 %	PSU	1,483	1.3 %	15.6 %
FMCG	30,648	0.4 %	16.3 %	Real Estate	209	3.0 %	21.6 %

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>
M & M	571	7.5 %	109.1 %	ITC	200	(3.7) %	20.1 %
Bajaj Fina	3,109	6.0 %	40.1 %	Lupin	876	(2.7) %	51.2 %
Hindalco I	154	5.4 %	68.4 %	Torrent Ph	2,347	(2.0) %	19.8 %
Tata Motor	109	5.4 %	60.4 %	Marico	352	(1.8) %	32.6 %
Bajaj Hold	2,654	4.2 %	51.3 %	Indraprast	441	(1.4) %	13.0 %

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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