



07 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,818	(0.1) %	6.4 %
BSE SENSEX	52,861	(0.0) %	5.7 %
CNX BANK	35,579	1.0 %	5.1 %
CNX MIDCAP	27,149	(0.1) %	12.6 %
CNX SMALLCAP	9,915	(0.7) %	19.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,577	(0.6) %	13.0 %
S&P 500	4,344	(0.2) %	15.6 %
FTSE 100	7,101	(0.9) %	8.0 %
HANG SENG	28,073	(0.3) %	2.2 %
NIKKEI	28,643	0.2 %	5.1 %
SHANGHAI COMPOSITE	3,530	(0.1) %	0.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.33	(0.1) %	1.9 %
EUR/USD	1.19	0.1 %	(3.3) %
GBP/USD	1.38	0.3 %	1.3 %
USD/JPY	111.04	(0.3) %	7.6 %
USD/AUD	1.33	(0.5) %	2.5 %
USD/SGD	1.35	0.1 %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	75	0.0 %	57.8 %
Gold(INR/10g)	47,571	0.6 %	(6.7) %
Gold Comex(USD/oz)	1,801	0.8 %	(7.6) %
SILVER(INR/1Kg)	69,756	0.3 %	1.3 %
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: After reporting record US service sector growth in the previous month, the Institute for Supply Management released a report on Tuesday showing the pace of growth in the sector slowed. The ISM said its services PMI slid to 60.1 in June from 64.0 in May, although a reading above 50 still indicates growth in the sector. Eurozone retail sales rose in May after falling in the previous month, Eurostat reported Tuesday. Retail turnover edged up 4.6% month-on-month in May, reversing a 3.9% drop in April. On a yearly basis, retail sales growth moderated to 9% from 23.3% in April. German economic confidence slipped to a six-month low in July, survey data from the ZEW showed Tuesday. The ZEW Indicator of Economic Sentiment tanked to 63.3 in July from 79.8 in the previous month. Germany factory orders dropped in May, data from Destatis revealed on Tuesday. On a yearly basis, factory orders surged 54.3% after expanding 80.2% in the previous month. UK construction output recovery gained further momentum during June, according to the latest PMI data. Overall construction activity expanded at the fastest pace since June 1997, supported by another sharp rise in new orders. At 66.3 in June, up from 64.2 in May, the seasonally adjusted IHS Markit/CIPS UK Construction PMI Total Activity Index signalled the strongest rate of output growth for exactly 24 years. Household spending in Japan rose 11.6% in real terms from a year earlier in May, after a 13% gain in April. The Reserve Bank Of Australia (RBA) board agreed on policy measures that will provide ongoing and important support to the Australian economy as it continues its recovery. The RBA decided to retain the April 2024 bond as the bond for the yield target and retain the target of 10 basis points continue purchasing government bonds after the completion of the current bond purchase program in early September.

Global Equities: The US stocks slipped heavily on profit selling at all-time highs.

Indian Economy: The gross GST revenue collected in the month of June 2021 stood at Rs 92,849 crore of which CGST stood at Rs 16,424 crore, SGST stood at Rs 20,397, IGST came at Rs 49,079 crore (including Rs 25,762 crore collected on import of goods) and Cess stood at Rs 6,949 crore (including Rs 809 crore collected on import of goods). The revenues for the month of June 2021 are 2% higher than the GST revenues in the same month last year. After posting above Rs 1 lakh crore mark for eight months in a row, the GST collection in June 2021 dropped below Rs 1 lakh crore.

Equity Markets: The main indices ended a volatile session with minor losses on Tuesday amid mixed global cues. Auto and IT shares tumbled while private banks advanced.

Corporate News: Sobha achieved total sales volume of 8,95,539 square feet of super built-up area valued at Rs 682.9 crore in Q1FY22 against 6,50,400 square feet of super built-up area valued at Rs 487.7 crore sold in Q1FY21. RBL Bank's total deposits grew by 21% YoY to 74,480 crore and gross advances increased by 2% to Rs 58,755 crore in June 2021 quarter. Power stocks could be in focus as power demand in the country touched an all-time high of 197.06 GW.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	59.0	(97.3)	7.6
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)	73,725	65,000	73,486
F&O(INR cr)	4,700,446	4,605,072	4,540,008

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.5	15.5	17.9
NSE VIX	12.3	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	35,579	1.0 %	5.1 %	Energy	19,726	(0.3) %	6.5 %
IT	28,649	(1.0) %	10.3 %	Pharma	14,407	(0.8) %	16.4 %
Metals	5,173	(0.3) %	23.5 %	Finance	16,772	1.0 %	5.4 %
Auto	10,560	(1.7) %	5.4 %	PSU	2,513	(1.3) %	13.5 %
FMCG	36,239	(0.4) %	3.9 %	Real Estate	353	(0.3) %	5.1 %

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>
Adani Tran	954	5.0 %	(4.5) %	Tata Motor	317	(8.4) %	3.0 %
Adani Gree	1,013	5.0 %	(12.7) %	Biocon	389	(3.6) %	(5.3) %
Godrej Con	964	4.2 %	32.8 %	NMDC	169	(3.3) %	22.4 %
Ambuja Cem	352	3.4 %	13.1 %	Piramal En	2,349	(2.5) %	32.0 %
UltraTech	6,933	3.2 %	0.5 %	Gland Phar	3,402	(2.5) %	37.8 %

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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