



07 Aug.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,200	0.0 %	35.7 %
BSE SENSEX	38,025	1.0 %	34.2 %
CNX BANK	21,643	0.0 %	18.9 %
CNX MIDCAP	15,905	0.0 %	38.7 %
CNX SMALLCAP	5,208	0.0 %	47.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,387	0.7 %	(4.0) %
S&P 500	3,349	0.6 %	3.7 %
FTSE 100	6,027	(1.3) %	(20.7) %
HANG SENG	24,931	(0.7) %	(12.7) %
NIKKEI	22,418	(0.4) %	(3.4) %
SHANGHAI COMPOSITE	3,386	0.3 %	9.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.67	(0.3) %	4.9 %
EUR/USD	1.18	0.8 %	5.6 %
GBP/USD	1.31	0.4 %	(0.6) %
USD/JPY	105.62	(0.4) %	(2.8) %
USD/AUD	1.39	(1.1) %	(2.6) %
USD/SGD	1.37	(0.5) %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	42	(0.6) %	(31.4) %
Gold(INR/10g)	55,522	0.5 %	42.4 %
Gold Comex(USD/oz)	2,063	0.6 %	33.7 %
SILVER(INR/1Kg)	72,884	2.7 %	58.3 %
Aluminium(USD/MT)	1,722	(1.0) %	(2.8) %
Copper(USD/MT)	6,454	(1.1) %	4.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.5	(0.0) %	(1.4) %

Global Economy: Following two straight weekly increases in first-time claims for U.S. unemployment benefits, the Labor Department released a report on Thursday showing initial jobless claims pulled back by much more than expected in the week ended August 1st. The report said initial jobless claims tumbled to 1.186 million, a decrease of 249,000 from the previous week's revised level of 1.435 million. Germany's factory orders advanced 27.9% on a monthly basis in June, faster than the 10.4% increase seen in May driven by both domestic and foreign demand, data from Destatis showed Thursday. Domestic orders advanced 35.3% and foreign orders climbed 22% from the previous month. Excluding major orders, real new orders in manufacturing were 23.8% higher than in the previous month. On a yearly basis, factory orders declined 11.3% in June, following a 29.3% decrease in May. The Bank Of England's main lending rate was kept at 0.1%, after it cut rates twice from 0.75% since the beginning of the coronavirus pandemic. The Monetary Policy Committee opted against extending its bond buying program, having announced a £100 billion expansion in June which took the total Asset Purchase Facility to £745 billion.

Global Equities: US equities stayed supported amid positive labour market data and continued buying support in index linked counters.

Indian Economy: The monetary policy committee (MPC), headed by RBI governor Shaktikanta Das, kept repo rate untouched at 4%; and reverse repo rate at 3.35% while maintaining the accommodative stance. The MPC had convened the three-day meeting on Tuesday, 4 August. RBI governor Shaktikanta Das said inflation is expected to stay elevated in Q2 FY21 but it is likely to ease in H2 aided by favourable base effects. Real GDP growth will remain in the negative, Das said. However, he added that any positive news on the COVID-19 containment efforts would change this scenario. RBI is taking measures to enhance liquidity support, further ease financial stress. Das said Rs 10,000 crore additional liquidity facility will be provided by NHB (National Housing Bank), NABARD (National Bank for Agriculture and Rural Development). RBI has also decided to permit one-time restructuring of corporate loans.

Equity Markets: Key benchmarks ended a volatile session with strong gains on Thursday. Trading was volatile due to weekly expiry of index options. The Reserve Bank of India (RBI) decided to keep rates unchanged in its monetary policy meeting. Banking and finance stocks were in demand as RBI allowed banks to restructure stressed loans. As per the provisional closing data, the barometer index, the S&P BSE Sensex spurted 362.12 points or 0.96% at 38,025.56. The Nifty 50 index jumped 104.8 points or 0.94% at 11,206.70.

Corporate News: The domestic road transport sector is likely to contract by up to 20 per cent on account of COVID-19 pandemic-induced challenges, rating agency IcrA said on Thursday. It has also revised the outlook on the logistics sector from 'Stable' to 'Negative'. Lupin said that the company signed exclusive distribution pact with ForDoz Pharma for two complex injectable assets under development in the US. Hindustan Petroleum Corporation (HPCL) reported a standalone profit at Rs 2,813.8 crore for the quarter ended June 2020, a sharp rise from Rs 26.8 crore in March quarter and Rs 811 crore in June quarter 2019. Profit was boosted by strong operating income due to lower overall expenses amid COVID-19-led lockdown.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(29.2)	363.6	76.3
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)	61,504	65,554	55,781
F&O(INR cr)	3,988,373	2,172,576	1,568,036

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.7	23.4	32.0
NSE VIX	23.2	23.9	33.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,643	0.6 %	18.9 %	Energy	15,408	0.5 %	43.0 %
IT	18,189	1.8 %	51.0 %	Pharma	11,404	1.2 %	62.3 %
Metals	2,295	1.4 %	47.7 %	Finance	10,797	1.0 %	20.7 %
Auto	7,498	0.1 %	61.0 %	PSU	1,413	(0.3) %	10.1 %
FMCG	31,288	1.4 %	18.7 %	Real Estate	205	1.1 %	18.9 %

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>
Hindustan	235	7.4 %	46.5 %	Muthoot Fi	1,193	(5.2) %	97.3 %
Aurobindo	910	5.7 %	131.9 %	Bandhan Ba	300	(3.5) %	54.0 %
Power Fin.	86	4.2 %	(3.0) %	Interglobe	945	(2.5) %	(5.4) %
Torrent Ph	2,976	4.2 %	51.9 %	Cadila Hea	389	(1.8) %	47.4 %
Shriram Tr	661	2.9 %	8.7 %	Shree Ceme	21,723	(1.7) %	31.3 %

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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