



07 Aug.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,237	1.0 %	7.9 %
BSE SENSEX	78,593	(0.2) %	7.0 %
CNX BANK	50,050	0.6 %	5.2 %
CNX MIDCAP	56,311	1.4 %	15.1 %
CNX SMALLCAP	18,093	1.2 %	14.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,998	0.8 %	3.4 %
S&P 500	5,240	1.0 %	10.5 %
FTSE 100	8,027	0.2 %	4.0 %
HANG SENG	16,647	(0.3) %	(0.8) %
NIKKEI	34,675	10.2 %	4.2 %
SHANGHAI COMPOSITE	2,867	0.2 %	(3.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.94	0.2 %	1.1 %
EUR/USD	1.09	0.3 %	(0.8) %
GBP/USD	1.28	(0.2) %	0.3 %
USD/JPY	143.66	(2.0) %	1.8 %
USD/AUD	1.54	0.5 %	5.1 %
USD/SGD	1.32	(0.3) %	0.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	0.0 %	3.6 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,387	(0.9) %	14.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,205	1.8 %	(5.6) %
Copper(USD/MT)	8,715	1.1 %	3.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	3.9	0.1 %	0.0 %

Global Economy: Reflecting a sharp increase in the value of exports, the Commerce Department released a report on Tuesday showing the U.S. trade deficit narrowed in the month of June. The Commerce Department said the trade deficit shrank to \$73.1 billion in June from a revised \$75.0 billion in May. The narrower trade deficit came as the value of exports jumped by 1.5 percent to \$265.9 billion, while the value of imports rose by 0.6 percent to \$339.0 billion. China's export growth for July came in at 7.0% Y-o-Y. Exports to the US and EU each grew by about 8% Y-o-Y, while exports to ASEAN countries surged by 12% Y-o-Y. Imports, on the other hand, rose by 7.2% Y-o-Y. As a result, China's trade surplus narrowed from USD 99.1 billion to USD 84.6 billion. Eurozone retail sales fell more than expected in June as both food and non-food products turnover decreased from the prior month, official data revealed Tuesday. Retail sales decreased 0.3 percent month-on-month in June, in contrast to the 0.1 percent rise in May, Eurostat said. Retail turnover, on a yearly basis, also decreased 0.3 percent in June. The UK construction sector expanded at the fastest pace in more than two years in July as election-related slowdown proved to be temporary, survey results from S&P Global showed on Tuesday. The headline S&P Global UK construction Purchasing Managers' Index rose unexpectedly to 55.3 in July from 52.2 in June. The unemployment rate in New Zealand came in at a seasonally adjusted 4.6 percent in the second quarter of 2024, Statistics New Zealand reported.

Global Indices: The Dow ended up 294.39 points or 0.76 percent at 38,997.66. The S&P 500 closed up by \$53.70 points or 1.04 percent at 5,240.03, while the Nasdaq settled higher by 166.77 points or 1.03 percent at 16,366.85.

Indian Economy: Ministry of Finance stated in a latest update that a total of 52.81 crore PM Jan-Dhan accounts with deposit balance of Rs 2,30,792 crore opened as on 19.07.2024 under, Pradhan Mantri Jan Dhan Yojana or PMJDY. As of now, a total of 29.37 crore (55.6%) Jan-Dhan accounts belong to women and about 35.15 crore (66.6%) PMJDY accounts have been opened in rural and semi-urban areas.

Equity Market: The barometer index, the S&P BSE Sensex, was down 166.33 points or 0.21% to 78,593.07. The Nifty 50 index lost 63.05 points or 0.26% to 23,992.55.

Corporate News: Tata Power profit slipped 0.2 per cent to Rs 970.9 crore from Rs 972.5 crore, but revenue increased 13.7 per cent to Rs 17,293.6 crore from Rs 15,213.3 crore. Tata Power also announced plans to acquire a 40 per cent stake in Khorlochhu Hydro Power for Rs 830 crore and received board approval for the termination and delisting of its Global Depository Shares (GDSs) Programme. Linde India reported a 13.8 per cent increase in profit to Rs 113.7 crore from Rs 99.88 crore, but revenue fell 9.4 per cent to Rs 653.2 crore from Rs 721 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(440.4)	(208.1)	20.9
MF(INR cr)	1,633.3	792.4	1,545.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	133,606	147,612	137,319
F&O(INR cr)	47,910,426	33,636,199	37,396,427

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.7	27.1	55.1
NSE VIX	18.7	16.6	15.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	49,748	(0.7) %	4.6 %	Energy	42,475	(0.4) %	7.6 %
IT	38,624	0.5 %	10.2 %	Pharma	21,563	(0.1) %	12.3 %
Metals	8,889	0.3 %	3.8 %	Finance	22,520	(1.1) %	6.2 %
Auto	24,520	(0.8) %	14.7 %	PSU	6,816	(1.3) %	(4.2) %
FMCG	61,604	0.1 %	14.3 %	Real Estate	1,001	0.8 %	6.5 %

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>
Britannia	5,855	2.7 %	19.6 %	Marico	629	(6.5) %	26.8 %
JSW Steel	884	2.3 %	1.4 %	Power Fin.	474	(4.8) %	18.2 %
Avenue Sup	4,910	1.9 %	9.5 %	HDFC Life	680	(4.4) %	7.1 %
Tech Mahin	1,483	1.9 %	19.2 %	Adani Ener	1,125	(3.0) %	1.2 %
Torrent Ph	3,221	1.7 %	20.4 %	Varun Beve	1,462	(2.8) %	4.6 %

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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