



08 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,811	(1.1) %	1.2 %
BSE SENSEX	39,513	(1.0) %	1.7 %
CNX BANK	31,476	0.0 %	3.8 %
CNX MIDCAP	17,530	(1.6) %	(4.4) %
CNX SMALLCAP	6,200	(1.3) %	(8.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,922	(0.2) %	15.4 %
S&P 500	2,990	(0.2) %	19.3 %
FTSE 100	7,553	(0.7) %	12.2 %
HANG SENG	28,775	(0.1) %	14.5 %
NIKKEI	21,746	0.2 %	11.2 %
SHANGHAI COMPOSITE	3,011	0.2 %	22.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.41	(0.2) %	(1.5) %
EUR/USD	1.12	(0.3) %	(1.8) %
GBP/USD	1.25	(0.3) %	(1.6) %
USD/JPY	108.22	0.4 %	(1.3) %
USD/AUD	1.43	0.4 %	0.5 %
USD/SGD	1.36	0.2 %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.3 %	23.6 %
Gold(INR/10g)	34,655	1.5 %	9.9 %
Gold Comex(USD/oz)	1,402	(1.3) %	8.6 %
SILVER(INR/1Kg)	37,775	1.7 %	(1.3) %
Aluminium(USD/MT)	1,780	0.5 %	(4.2) %
Copper(USD/MT)	5,857	(0.7) %	0.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.0	1.4 %	(0.6) %

Global Economy: US nonfarm employment surged up by 224,000 jobs in June after edging up by a downwardly revised 72,000 jobs in May, the Labor Department stated, having reported disappointing job growth in the previous month. The Labor Department said the stronger than expected job growth reflected significant job gains in professional and business services, healthcare, and transportation and warehousing. Government employment also rebounded by 33,000 jobs in June after falling by 11,000 jobs in May, while the report also showed notable increases in manufacturing and construction jobs. Germany's factory orders declined sharply in May as trade disputes weighed on foreign demand, figures from Destatis showed Friday. Factory orders decreased 2.2% month-on-month in May, in contrast to a 0.4% gain in April. This was the first fall in three months.

Global Equities: The US stocks fell sharply after the nonfarm data but recovered impressively on excellent buying support as investors focussed on the strength in the economy.

Indian Economy: Finance Minister Nirmala Sitharaman's maiden budget is a mega investment-oriented initiative with a strong focus on scaling up rural infrastructure and demand along with slew of tax simplification measures, aimed at boosting growth, maintaining high level of fiscal discipline, ASSOCHAM noted. Focus on affordable housing with higher tax benefits to end users, Start Ups, sustainable development, and Make in India, is clearly visible, along with a firm assurance of ease of living for common citizens and businesses by the tax authorities. The initiatives like e-assessment, inter-changeability of PAN and Aadhaar, digital payment would make a big difference to tax payers. Likewise, the increase in the threshold for lower corporate tax of 25% to Rs 400 crore annual turnover would encourage higher investment which would also get a boost from proposals like further liberalisation of FDI norms in sectors like insurance intermediaries and aviation. Meanwhile, the area sown under kharif crops was down by 27% at 234.33 lakh hectares, according to the latest government data.

Equity Markets: Key equity benchmarks snapped four-day rising trend on Friday, dragged by weakness in IT and auto shares, as profit selling after the Union Budget triggered a bout of correction. The barometer index, the S&P BSE Sensex, fell 394.67 points or 0.99% to 39,513.39. The Nifty 50 index fell 135.60 points or 1.14% to 11,811.15.

Corporate News: Banking stocks would continue to be in a good nick as in order to enable the banks to deal with the NBFCs/HFCs issue effectively, the Reserve Bank of India stated that it will provide required liquidity backstop to the banks against their excess G-sec holdings. Zuari Agro Chemicals announced that Urea/Ammonia Plants of the Company have been shut down due to tube leak of the PG- Reboiler in the CO2 removal section of the Ammonia plant. Tata Global Beverages announced that CARE Ratings has reaffirmed the rating CARE A1+ for company's commercial paper.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	80.7	(113.9)	63.1
MF(INR cr)	190.7	(7.4)	105.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,222	29,716	34,074
F&O(INR cr)	1,046,887	1,111,082	1,222,785

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.3	13.1	15.1
NSE VIX	13.1	13.8	19.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,476	0.0 %	3.8 %	Energy	15,818	(2.4) %	(4.3) %
IT	15,550	(2.5) %	(1.8) %	Pharma	7,927	(1.5) %	(15.5) %
Metals	2,851	(3.8) %	(8.1) %	Finance	13,799	(0.0) %	10.4 %
Auto	7,849	(2.8) %	(6.7) %	PSU	3,303	0.2 %	(2.4) %
FMCG	29,973	0.3 %	(0.7) %	Real Estate	282	(3.6) %	5.6 %

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>
Indiabulls	727	3.3 %	(14.1) %	Yes Bank	88	(8.4) %	(68.1) %
L&T Fin.Ho	124	3.3 %	(18.5) %	Siemens	1,260	(7.2) %	11.3 %
IndusInd B	1,533	2.6 %	(12.1) %	S A I L	48	(6.8) %	(12.2) %
Colgate-Pa	1,178	2.3 %	(6.4) %	A B B	1,542	(6.7) %	17.0 %
Piramal En	1,992	2.2 %	(26.1) %	Avenue Sup	1,356	(5.4) %	(9.2) %

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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