



08 Jul.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|--------|
| CNX NIFTY | 10,827 | 0.2 % | 31.2 % |
| BSE SENSEX | 36,675 | 0.5 % | 30.0 % |
| CNX BANK | 22,628 | 0.0 % | 24.3 % |
| CNX MIDCAP | 15,364 | 0.0 % | 33.9 % |
| CNX SMALLCAP | 4,840 | 0.0 % | 36.7 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 25,890 | (1.5) % | (9.3) % |
| S&P 500 | 3,145 | (1.1) % | (2.6) % |
| FTSE 100 | 6,190 | (1.5) % | (18.6) % |
| HANG SENG | 25,976 | (1.4) % | (9.0) % |
| NIKKEI | 22,615 | (0.4) % | (2.5) % |
| SHANGHAI COMPOSITE | 3,345 | 0.4 % | 8.4 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 74.53 | 0.3 % | 4.7 % |
| EUR/USD | 1.13 | 0.5 % | 0.7 % |
| GBP/USD | 1.25 | 0.5 % | (5.0) % |
| USD/JPY | 107.55 | 0.0 % | (1.0) % |
| USD/AUD | 1.44 | (0.3) % | 0.8 % |
| USD/SGD | 1.39 | (0.0) % | 3.6 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 41 | (0.0) % | (33.6) % |
| Gold(INR/10g) | 48,235 | 0.1 % | 23.7 % |
| Gold Comex(USD/oz) | 1,809 | 0.9 % | 17.3 % |
| SILVER(INR/1Kg) | 48,740 | (0.6) % | 5.8 % |
| Aluminium(USD/MT) | 1,597 | 0.2 % | (9.9) % |
| Copper(USD/MT) | 6,086 | (0.4) % | (1.3) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 0.6 | (0.1) % | (1.3) % |

Global Economy: The uptick in US coronavirus cases could dampen the recovery of the nation's economy, according to Raphael Bostic, the president of the Federal Reserve Bank of Atlanta. He noted that business reopening has leveled off. European Commission revised down its forecasts for the Eurozone economy this year and next, to reflect a deeper contraction in 2020 and a weaker rebound in 2021. The Commission now expects the Eurozone economy to shrink by 8.7% this year, rather than the 7.7% it expected at its last quarterly update in April. Euro zone will grow by 6.1%, rather than the 6.3% it originally forecast, noted European Commission. The Commission noted that the heavy impact of the virus across the US and key emerging export markets such as Latin America and India would crimp Europe's ability to export its way out of recession. Germany's industrial production grew 7.8% on a monthly basis in May, in contrast to a revised 17.5% fall in April, helped by an easing of lockdown measures, Destatis reported Tuesday. On a yearly basis, industrial production declined 19.3% versus a revised 25% decrease in April. Excluding energy and construction, industrial production was up 10.3% in May. Energy production gained 1.7% in May and construction output grew 0.5%. UK house prices dropped for the fourth consecutive month in June amid a gradual relaxation of coronavirus containment measures. House prices fell marginally by 0.1% month-on-month in June, following a 0.2% drop in May. On a yearly basis, house prices advanced 2.5% but slower than the 2.6% increase seen in May. In three months to June, house prices were down 0.9% from the preceding three months. Japan average household spending was down 16.2% on year in May, coming in at 252,017 yen, following the 11.1% decline in April. Reserve Bank of Australia (RBA) kept its key interest rate and the target yield on three-year government bonds unchanged on Tuesday. The board of Reserve Bank of Australia, governed by Philip Lowe, decided to maintain cash rate and the targeted yield on three-year government bonds of 25 basis points.

Global Equities: DOW eased after recent spurt. European stocks also fell sharply over growth worries.

Indian Economy: The World Bank and the Government of India signed the \$750 million agreement for the MSME Emergency Response Programme to support increased flow of finance into the hands of micro, small, and medium enterprises (MSMEs), severely impacted by the COVID-19 crisis. The World Bank's MSME Emergency Response Programme will address the immediate liquidity and credit needs of some 1.5 million viable MSMEs to help them withstand the impact of the current shock and protect millions of jobs. This is the first step among a broader set of reforms that are needed to propel the MSME sector over time.

Equity Markets: The local market extended its winning run for the fifth consecutive session on Tuesday. Banks and IT stocks rallied. Easing of lockdown curbs, impressive recovery rate from coronavirus and decent Q1 operating performance by banks boosted sentiment. In the broader market, the S&P BSE Mid-Cap index rose 0.58% while the S&P BSE Small-Cap index gained 0.57%.

Corporate News: Infrastructure companies could be in focus today as Union minister for road transport and highways Nitin Gadkari on Tuesday chaired a high-level meeting with railway minister Piyush Goyal and environment minister Prakash Javadekar to expedite pending infrastructure projects in the country. : TCS stated that Digitate, a software venture of the company announced that the ignio SaaS suite of AI-driven software. Birlasoft Ltd announced its partnership with Innoveo, a leading global technology company.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 63.7 | (30.0) | 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) | 69,061 | 57,619 | 53,201 |
| F&O(INR cr) | 1,459,493 | 1,680,038 | 1,416,020 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 29.4 | 28.3 | 34.0 |
| NSE VIX | 25.1 | 26.1 | 36.0 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 22,628 | 1.9 % | 24.3 % | Energy | 14,697 | (2.0) % | 36.4 % |
| IT | 15,785 | 2.1 % | 31.0 % | Pharma | 9,878 | (0.2) % | 40.6 % |
| Metals | 2,023 | (1.7) % | 30.2 % | Finance | 11,194 | 1.5 % | 25.2 % |
| Auto | 7,200 | 0.4 % | 54.6 % | PSU | 1,478 | (0.3) % | 15.2 % |
| FMCG | 30,518 | (0.4) % | 15.8 % | Real Estate | 208 | (0.7) % | 20.7 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Bosch | 13,481 | 12.0 % | 46.0 % | Indraprast | 416 | (5.8) % | 6.4 % |
| Bandhan Ba | 395 | 10.6 % | 102.5 % | Petronet L | 261 | (4.8) % | 30.6 % |
| Bajaj Fina | 3,352 | 7.8 % | 51.0 % | Adani Port | 346 | (3.8) % | 41.3 % |
| Bajaj Hold | 2,853 | 7.5 % | 62.6 % | Adani Tran | 255 | (3.0) % | 34.5 % |
| IndusInd B | 526 | 6.1 % | 53.8 % | NTPC | 93 | (2.8) % | 14.3 % |

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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