



08 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,880	0.4 %	6.8 %
BSE SENSEX	53,055	0.4 %	6.0 %
CNX BANK	35,771	0.5 %	5.7 %
CNX MIDCAP	27,328	0.7 %	13.3 %
CNX SMALLCAP	9,976	0.6 %	20.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,682	0.3 %	13.3 %
S&P 500	4,358	0.3 %	16.0 %
FTSE 100	7,151	0.7 %	8.8 %
HANG SENG	27,961	(0.4) %	1.8 %
NIKKEI	28,367	(1.0) %	4.1 %
SHANGHAI COMPOSITE	3,554	0.7 %	1.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.26	(0.1) %	1.8 %
EUR/USD	1.19	0.0 %	(3.3) %
GBP/USD	1.38	0.1 %	1.4 %
USD/JPY	110.99	(0.1) %	7.6 %
USD/AUD	1.33	(0.1) %	2.4 %
USD/SGD	1.35	(0.2) %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	(2.6) %	51.6 %
Gold(INR/10g)	47,835	0.6 %	(6.2) %
Gold Comex(USD/oz)	1,806	0.2 %	(7.4) %
SILVER(INR/1Kg)	69,393	(0.5) %	0.8 %
Aluminium(USD/MT)	2,509	(0.8) %	24.6 %
Copper(USD/MT)	9,452	(0.8) %	19.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	(0.0) %	0.4 %

Global Economy: The minutes of the US Federal Reserve's latest monetary policy meeting suggest the central bank will not be in a hurry to begin scaling back its asset purchase program. The European Commission upgraded the economic projections citing the improving health situation and the ensuing continued easing of virus containment measures. According to the latest Summer Interim Forecast, economic output is forecast to return to the pre-pandemic levels in the last quarter of 2021. The euro area economy is forecast to grow 4.8% in 2021, instead of 4.3% projected previously. Likewise, the outlook for 2022 was raised to 4.5% from 4.4%. Germany's industrial production fell 0.3% month-on-month in May, the same pace of decline as seen in April, data from Destatis showed on Wednesday. On a yearly basis, industrial output growth moderated to 17.3% from 27.6% a month ago. Excluding energy and construction, industrial production was down 0.5%. UK house prices fell 0.5% on a monthly basis in June, reversing a 1.2% rise in May, data from Lloyds Bank subsidiary Halifax and IHS Markit showed Wednesday. House prices decline for the first time in five months in June as the government phases out stamp duty holiday. The property prices averaged GBP 260,358. Year-on-year, house price inflation eased to 8.8% in June from a 14-year high of 9.6% in May. Japan's coincident indicator index, which consists of a range of data including factory output, employment and retail sales, lost a preliminary 2.6 points from the previous month to 92.7 in May, the Cabinet Office said. Australia services sector stays in expansion in June, with a Performance of Services Index score of 57.8, the latest survey from the Australian Industry Group revealed on Wednesday. That's down from 61.2 in May, although it remains well above the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: The US stocks stayed largely supported in choppy trades yesterday. Some selling pressure was seen in tech counters though.

Indian Economy: The Reserve Bank Of India (RBI) has reported that currency in circulation contracted by 0.2% on the week to stand at Rs 29.73 lakh crore as on July 2, 2021. The central bank stated further that the overall reserve money rose 0.7% on the week to Rs 37.26 lakh crore. Currency in circulation rose around 11.50% on a year ago basis compared to 21.3% growth at the same time last year. In the current fiscal, the currency in circulation has increased by 4.2% so far while the reserve money has increased by 3.5%.

Equity Markets: The main indices ended at the day's high with decent gains on Wednesday. The Nifty closed above the crucial 15,850 level. Barring the Nifty Auto index and the Nifty Media index, all sectoral indices on the NSE ended in the green.

Corporate News: Tata Consultancy Services will be watched ahead of the release of its quarterly earnings today. Zuari Global has acquired 13.19% shares of Forte Furniture Products India from Indian Furniture Products (IFPL) subsidiary of the company. Bajaj Healthcare has received license from Defence Research and Development Organisation (DRDO) to manufacture and market '2-Deoxy-D-Glucose' (2-DG), used in control and treatment of COVID-19.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	139.4	(38.2)	9.8
MF(INR cr)	1,446.9	292.6	200.6

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	64,144	64,829	73,343
F&O(INR cr)	4,648,961	4,613,850	4,541,658

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.4	15.6	17.9
NSE VIX	12.2	12.3	18.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,771	0.5 %	5.7 %	Energy	19,694	(0.2) %	6.4 %
IT	28,735	0.3 %	10.6 %	Pharma	14,453	0.3 %	16.8 %
Metals	5,286	2.2 %	26.2 %	Finance	16,874	0.6 %	6.1 %
Auto	10,553	(0.1) %	5.3 %	PSU	2,524	0.4 %	14.0 %
FMCG	36,447	0.6 %	4.5 %	Real Estate	360	2.0 %	7.1 %

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>
Tata Steel	1,219	4.4 %	41.2 %	Titan Comp	1,727	(2.0) %	10.8 %
Berger Pai	846	3.9 %	10.7 %	Bajaj Hold	3,786	(2.0) %	13.4 %
Gland Phar	3,500	2.9 %	41.8 %	P & G Hygi	13,352	(1.7) %	6.2 %
JSW Steel	690	2.6 %	35.7 %	Aurobindo	965	(1.6) %	9.5 %
Colgate-Pa	1,725	2.5 %	10.4 %	Adani Tran	940	(1.5) %	(6.0) %

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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