



09 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,706	0.0 %	29.7 %
BSE SENSEX	36,329	(0.9) %	28.5 %
CNX BANK	22,585	0.0 %	24.0 %
CNX MIDCAP	15,304	0.0 %	33.4 %
CNX SMALLCAP	4,828	0.0 %	36.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,067	0.7 %	(8.7) %
S&P 500	3,170	0.8 %	(1.9) %
FTSE 100	6,156	(0.6) %	(19.0) %
HANG SENG	26,129	0.6 %	(8.5) %
NIKKEI	22,439	(0.8) %	(3.3) %
SHANGHAI COMPOSITE	3,403	1.7 %	10.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.69	0.5 %	4.9 %
EUR/USD	1.13	0.0 %	0.8 %
GBP/USD	1.26	0.6 %	(4.7) %
USD/JPY	107.47	(0.1) %	(1.1) %
USD/AUD	1.44	0.2 %	0.8 %
USD/SGD	1.39	0.1 %	3.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	0.7 %	(33.1) %
Gold(INR/10g)	48,965	1.5 %	25.6 %
Gold Comex(USD/oz)	1,821	0.7 %	18.1 %
SILVER(INR/1Kg)	50,008	2.6 %	8.6 %
Aluminium(USD/MT)	1,619	1.4 %	(8.6) %
Copper(USD/MT)	6,194	1.8 %	0.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	0.0 %	(1.3) %

Global Economy: The US Fed said US consumer credit slumped by \$18.2 billion in May after plunging by a revised \$70.2 billion in April. Compared to the same month a year ago, consumer credit in May was down by 5.3% as a 28.6% nosedive in revolving credit more than offset a 2.3% jump in non-revolving credit. UK hiring activity continued to fall in June due to the coronavirus pandemic, a report on Jobs compiled by IHS Markit showed on Wednesday. Both permanent staff placements and temporary billings decreased at notably weaker rates than in April and May when the covid-19 pandemic was at its most severe. However, rates of contraction remained sharp. Japan posted a current account surplus of 1,176.8 billion yen in May, the Ministry of Finance said on Wednesday, and was up from 262.7 billion yen in April. The trade balance showed a deficit of 556.8 billion yen, down 18.1% on year. Exports tumbled 28.9 percent on year to 4.197 trillion yen, while imports sank an annual 27.7% to 4.754 trillion yen. The total value of overall bank lending in Japan rose 6.2% on year in June, the Bank of Japan said on Wednesday - coming in at 570.111 trillion yen, following the 4.8% gain in May. Excluding trusts, bank lending rose an annual 6.5% to 497.758 trillion yen, accelerating from the 5.1% gain in the previous month. Lending from trusts gained 4.5% on year to 72.353 trillion yen, up from 2.7% a month earlier. Lending from foreign banks soared 10.1% to 3.242 trillion yen, easing from 12.1% in May.

Global Equities: US stocks were supported in largely steady moves. NASDAQ hit another high.

Indian Economy: Net equity inflows into mutual funds slumped to Rs 240.55 crore in June from Rs 5,256.52 crore in May, as per the latest data released by AMFI. Large cap funds and multi cap funds saw outflows in June. Meanwhile, the total inflows into various debt mutual fund categories stood at Rs 2,861.68 crore, compared to Rs 63,665.54 crore in May. Finance Minister reviewed capital expenditure of 23 Central Public Sector Enterprises and stated that they should spend half of annual capital expenditure target by Q2 of fiscal 2020-21.

Equity Markets: The local market corrected on Wednesday, snapping a five-day rising streak. Mixed global cues triggered profit booking in domestic shares. IT stocks tumbled while metal shares bucked trend. The barometer S&P BSE Sensex tumbled 345.51 points or 0.94% at 36,329.01. The Nifty 50 index lost 93.90 points or 0.87% at 10,705.75. Both these indices jumped about 5% in the past five trading sessions.

Corporate News: IRB Infrastructure Developers said it has raised Rs 150 crore through allotment of NCDs on a private placement basis. The Supreme Court Wednesday recalled its March 27 order by which it had allowed sale of BS-IV vehicles for 10 days across India, except in Delhi-NCR, after lifting of COVID-19 induced lockdown. Indian Oil Corporation (IOCNSE 0.93 %), the nation's biggest oil firm said with easing of lockdown restrictions, it has resumed work on projects worth Rs 1.04 lakh crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(222.5)	(68.5)	60.6
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)	1,945,370	1,724,260	1,424,164

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.1	28.2	33.9
NSE VIX	26.1	26.1	35.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,585	(0.2) %	24.0 %	Energy	14,554	(1.0) %	35.1 %
IT	15,514	(1.7) %	28.8 %	Pharma	9,949	0.7 %	41.6 %
Metals	2,054	1.6 %	32.2 %	Finance	11,129	(0.6) %	24.5 %
Auto	7,059	(1.9) %	51.6 %	PSU	1,512	2.3 %	17.9 %
FMCG	30,774	0.8 %	16.8 %	Real Estate	204	(1.9) %	18.4 %

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>
General In	161	6.3 %	52.8 %	Zee Entert	172	(4.5) %	42.4 %
P & G Hygi	10,971	6.0 %	5.4 %	DLF	146	(4.3) %	10.4 %
IndusInd B	553	5.0 %	61.5 %	Bajaj Fina	3,208	(4.3) %	44.5 %
Shriram Tr	758	4.7 %	21.9 %	Bandhan Ba	379	(3.9) %	94.6 %
Bank of Ba	53	3.8 %	2.9 %	Asian Pain	1,686	(3.4) %	5.2 %

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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