



09 Aug.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	16,238	(0.3) %	9.2 %
BSE SENSEX	54,278	(0.4) %	8.5 %
CNX BANK	35,809	(0.1) %	5.8 %
CNX MIDCAP	27,946	0.1 %	15.9 %
CNX SMALLCAP	10,430	0.0 %	25.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,209	0.4 %	15.0 %
S&P 500	4,437	0.2 %	18.1 %
FTSE 100	7,123	0.0 %	8.4 %
HANG SENG	26,179	(0.1) %	(4.7) %
NIKKEI	27,820	0.3 %	2.1 %
SHANGHAI COMPOSITE	3,458	(0.2) %	(1.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.98	(0.1) %	1.4 %
EUR/USD	1.18	(0.2) %	(3.5) %
GBP/USD	1.39	0.0 %	1.9 %
USD/JPY	109.68	0.4 %	6.3 %
USD/AUD	1.35	(0.0) %	4.2 %
USD/SGD	1.35	0.1 %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(1.2) %	43.4 %
Gold(INR/10g)	47,464	(0.6) %	(7.0) %
Gold Comex(USD/oz)	1,808	0.0 %	(7.3) %
SILVER(INR/1Kg)	66,516	(1.4) %	(3.4) %
Aluminium(USD/MT)	2,619	1.4 %	30.0 %
Copper(USD/MT)	9,530	1.1 %	20.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.1 %	0.4 %

Global Economy: The US Labor Department said non-farm payroll employment surged by 943,000 jobs in July after surging by an upwardly revised 938,000 jobs in June. The unemployment rate slid to 5.4% in July from 5.9% in June, falling to its lowest level since March of 2020. The report also said average hourly employee earnings rose by \$0.11 or 0.4% to \$30.54 in July. Annual wage growth accelerated to 4% in July from 3.7% in June. The US Commerce Department released a report on Friday showing wholesale inventories in the US increased in the month of June. The report showed wholesale inventories jumped by 1.1% in June after surging up by 1.3% in May. Germany's industrial production dropped in June; data published by Destatis revealed on Friday. Industrial output dropped 1.3% in June from May, when production was down by revised 0.8%. Excluding energy and construction, industrial production decreased 0.9%. Year-on-year, industrial output grew 5.1%, which was slower than the 16.6% increase seen in May. Japan's leading index, which measures the future economic activity, rose to 104.1 in June from 102.6 in May, preliminary data from the Cabinet Office showed on Friday. This was the highest since February 2014, when the reading was 104.5. The coincident index increased to 94.0 in June from 92.1 in the previous month. In April, the index was 95.3. The lagging index grew to 96.5 in June from 93.2 in the prior month. In April, the index was 94.1.

Global Equities: The Dow and S&P 500 reached new record closing highs though tech stocks pulled back on profit selling.

Indian Economy: The RBI Monetary Policy Committee (MPC), on the basis of an assessment of the current and evolving macroeconomic situation, at its meeting today (August 6, 2021) decided to keep the policy repo rate under the liquidity adjustment facility (LAF), unchanged at 4%. Consequently, the reverse repo rate under the LAF remains unchanged at 3.35% and the marginal standing facility (MSF) rate and the Bank Rate at 4.25%. The MPC also decided to continue with the accommodative stance as long as necessary to revive and sustain growth on a durable basis and continue to mitigate the impact of COVID-19 on the economy, while ensuring that inflation remains within the target going forward. These decisions are in consonance with the objective of achieving the medium-term target for consumer price index (CPI) inflation of 4% within a band of +/- 2%, while supporting growth.

Equity Markets: Benchmark indices snapped four day winning run and closed with tiny losses on Friday. The Nifty closed below the 16,250 level after trading above that range for most part of the day. The Reserve Bank of India kept repo rate unchanged at 4%.

Corporate News: India's power consumption spiked 9.3% in the first week of August to 28.08 billion units (BU) due to improved economic activities after easing of lockdown curbs by states, according to power ministry data. SAIL: The company reported consolidated profit at Rs 3,897.4 crore in Q1FY22 against loss of Rs 1,226.5 crore in Q1FY21 while its revenue surged to Rs 20,643 crore from Rs 9,067 crore YoY. Bank of Baroda reported profit at Rs 1,280.6 crore in Q1FY22 against loss of Rs 864.3 crore in Q1FY21 while its net interest income rose to Rs 7,891.9 crore from Rs 6,816.1 crore YoY. NALCO reported sharply higher profit at Rs 347.7 crore in Q1FY22 against Rs 16.6 crore in Q1FY21. Its revenue surged to Rs 2,474.5 crore from Rs 1,380.6 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(73.1)	119.2	(5.7)
MF(INR cr)	1,000.4	771.8	339.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	68,394	74,327	72,614
F&O(INR cr)	3,142,137	5,819,735	4,814,967

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.3	18.2	17.9
NSE VIX	12.6	13.1	16.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,809	(0.1) %	5.8 %	Energy	19,412	(0.1) %	4.8 %
IT	31,303	0.3 %	20.5 %	Pharma	14,518	(0.4) %	17.3 %
Metals	5,841	0.1 %	39.4 %	Finance	17,136	(0.3) %	7.7 %
Auto	10,250	0.2 %	2.3 %	PSU	2,443	0.0 %	10.3 %
FMCG	36,670	(0.1) %	5.1 %	Real Estate	403	(1.0) %	20.1 %

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>
Adani Ente	1,537	7.3 %	38.8 %	Cipla	911	(3.6) %	11.4 %
GAIL (Indi	149	4.1 %	6.1 %	Ambuja Cem	404	(3.6) %	29.9 %
IndusInd B	1,030	3.2 %	3.6 %	DLF	343	(2.4) %	17.5 %
Piramal En	2,666	2.6 %	49.8 %	Abbott Ind	17,506	(2.3) %	16.9 %
Adani Port	711	2.5 %	(3.5) %	Muthoot Fi	1,547	(2.3) %	27.4 %

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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