



10 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,813	0.0 %	31.0 %
BSE SENSEX	36,738	1.1 %	30.0 %
CNX BANK	22,907	0.0 %	25.8 %
CNX MIDCAP	15,362	0.0 %	33.9 %
CNX SMALLCAP	4,880	0.0 %	37.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,706	(1.4) %	(9.9) %
S&P 500	3,152	(0.6) %	(2.4) %
FTSE 100	6,050	(1.7) %	(20.4) %
HANG SENG	26,210	0.3 %	(8.2) %
NIKKEI	22,529	0.4 %	(2.9) %
SHANGHAI COMPOSITE	3,451	1.4 %	11.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.76	0.3 %	5.0 %
EUR/USD	1.13	0.3 %	1.0 %
GBP/USD	1.26	0.8 %	(4.2) %
USD/JPY	107.27	(0.3) %	(1.3) %
USD/AUD	1.43	(0.3) %	0.6 %
USD/SGD	1.39	(0.2) %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	0.7 %	(33.1) %
Gold(INR/10g)	49,054	0.2 %	25.8 %
Gold Comex(USD/oz)	1,821	0.7 %	18.1 %
SILVER(INR/1Kg)	50,993	2.0 %	10.7 %
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 initial jobless claims tumbled to 1.314 million, a decrease of 99,000 from the previous week's revised level of 1.413 million. China consumer prices climbed to 2.7% on year in June, the National Bureau of Statistics said on Thursday, up from 2.4% in May. On a monthly basis, consumer prices were down 0.1% following the 0.8% decline in the previous month. The stats bureau also stated that producer prices tumbled 3.7% on year, unchanged from the previous month's reading. The German exports grew 9% month-on-month in May, reversing a 24% decline in April, marking the first increase in three months. The imports rose 3.5% after falling 16.6% a month ago. As a result, the trade surplus rose to a seasonally adjusted EUR 7.6 billion from EUR 3.4 billion in April. Japan total value of core machine orders was up a seasonally adjusted 1.7% on month, the Cabinet Office said on Thursday coming in at 765.0 billion yen, following the 12% slide in April. On a yearly basis, core machine orders dropped 16.3% following the 17.7% fall in the previous month. For the second quarter of 2020, core machine orders are forecast to have fallen 0.9% on quarter and 10.4% on year. Australia home loans tumbled a seasonally adjusted 10.2% on month in May, the Australian Bureau of Statistics said, coming in at A\$12.31 billion following the 5% decline in April.

Global Equities: US stocks pulled back on rising Covid-19 cases. European markets also ended lower with heavy losses in UK equities as finance minister Rishi Sunak warned that the UK was headed towards a significant recession.

Indian Economy: A formal Memorandum of Understanding (MoU) was signed between the Central Board of Direct Taxes (CBDT) and the Securities and Exchange Board of India (SEBI) for data exchange between the two organizations. The Reserve Bank Of India (RBI) reported yesterday that currency in circulation rose 0.2% on the week to stand at Rs 26.65 lakh crore as on July 3 2020. The central bank stated further that the overall reserve money gained by 0.5% on the week to Rs 31.79 lakh crore. Currency in circulation rose around 21.3% on a year ago basis compared to 13.3% rise at the same time last year. In the current fiscal, the currency in circulation has gone up by nearly 9% so far while the reserve money has edged up by 5%.

Equity Markets: Domestic shares resumed uptrend on Thursday after a day's pause. Banks and metal shares rallied while FMCG shares declined. Indices witnessed a bout of volatility due to expiry of weekly index options on NSE. The barometer S&P BSE Sensex jumped 408.68 points or 1.12% at 36,737.69. The Nifty 50 index climbed 107.70 points or 1.01% at 10,813.45.

Corporate News: Tata Consultancy Services, India's biggest IT company reported 13.81% year-on-year fall in profit at Rs 7,008 crore for the first quarter ended June 30. Consolidated revenue of the company inched higher by 0.39% on a yearly basis to Rs 38,322 crore. Revenue in constant currency terms witnessed a drop of 6.3% YoY. Punjab National Bank: Board approved raising up to Rs 10,000 crore via QIP, FPO, rights issue or any other mode; and sought shareholders nod to raise Rs 7,000 crore in equity capital at its AGM. VIP Industries said its board approved raising up to Rs 100 crore via NCDs.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(141.2)	(80.6)	57.5
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)	55,644	57,290	53,239
F&O(INR cr)	3,257,396	1,943,279	1,451,940

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.1	28.2	33.9
NSE VIX	24.9	26.0	35.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,907	1.4 %	25.8 %	Energy	14,621	0.5 %	35.7 %
IT	15,536	0.1 %	29.0 %	Pharma	9,988	0.4 %	42.1 %
Metals	2,094	1.9 %	34.8 %	Finance	11,305	1.6 %	26.4 %
Auto	7,086	0.4 %	52.1 %	PSU	1,531	1.2 %	19.3 %
FMCG	30,672	(0.3) %	16.4 %	Real Estate	205	0.5 %	19.0 %

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>
Hindalco I	165	6.3 %	79.8 %	Shriram Tr	721	(4.8) %	18.7 %
Bajaj Fina	3,330	3.8 %	50.0 %	P & G Hygi	10,623	(3.2) %	2.0 %
St Bk of I	199	3.8 %	6.7 %	H P C L	205	(3.0) %	11.6 %
Ambuja Cem	202	3.3 %	28.9 %	HDFC AMC	2,489	(2.7) %	13.9 %
Tata Steel	345	3.1 %	29.3 %	Bharti Inf	215	(2.2) %	38.3 %

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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