



14 Jul.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,803	0.0 %	30.9 %
BSE SENSEX	36,694	0.3 %	29.8 %
CNX BANK	22,089	0.0 %	21.3 %
CNX MIDCAP	15,217	0.0 %	32.7 %
CNX SMALLCAP	4,873	0.0 %	37.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,086	0.0 %	(8.6) %
S&P 500	3,155	(0.9) %	(2.3) %
FTSE 100	6,176	1.3 %	(18.8) %
HANG SENG	25,772	0.2 %	(9.7) %
NIKKEI	22,785	2.2 %	(1.8) %
SHANGHAI COMPOSITE	3,443	1.8 %	11.6 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.91	0.2 %	5.2 %
EUR/USD	1.13	0.1 %	1.1 %
GBP/USD	1.26	(0.1) %	(4.4) %
USD/JPY	107.10	(0.2) %	(1.4) %
USD/AUD	1.44	0.1 %	0.7 %
USD/SGD	1.39	(0.2) %	3.2 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	2.3 %	(33.7) %
Gold(INR/10g)	49,079	(0.1) %	25.9 %
Gold Comex(USD/oz)	1,817	0.4 %	17.8 %
SILVER(INR/1Kg)	51,513	1.3 %	11.9 %
Aluminium(USD/MT)	1,640	(1.2) %	(7.5) %
Copper(USD/MT)	6,323	(0.3) %	2.5 %

## FIXED INCOME

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

**Global Economy:** Germany's economy has started to recover after easing of coronavirus containment measures, the Economy Ministry said Monday. The economy has passed the trough. However, the ministry said the recovery process is just beginning and the capacities are still underutilized. According to German Economic ministry, industrial production has bottomed out. Production is expected to pick up in months ahead on increased order intake. Nonetheless, weak demand from non-European economies remains a risk for the further recovery. Japan's tertiary industry activity decreased 2.1% month-on-month in May, following a 7.7% fall in April, data from the Ministry of Economy, Trade and Industry showed on Monday. This was the fourth consecutive decline. Data showed that the broad-ranging personal services declined 0.6% in May, and broad-ranging business services fell 3.9%. On an annual basis, tertiary activity declined 15.9% in May, following a 13.2% fall in the prior month.

**Global Equities:** US stocks saw a massive pullback in intraday moves. The tech-heavy Nasdaq showed a sharp drop after reaching a new record intraday high, sliding more than 2%.

**Indian Economy:** Federation of Indian Chambers of Commerce & Industry (FICCI) stated that its latest Economic Outlook Survey has projected India's annual median GDP growth for 2020-21 at -4.5% as the rapid spread of COVID-19 pandemic is manifesting into an economic and healthcare crisis globally. The latest forecast marks a sharp downward revision from the growth estimate of 5.5% reported in the January 2020 survey. The pandemic outbreak has severely impacted the economic activities, FICCI noted. The total acreage under kharif crops continues to see good improvement and stood at 580.21 lakh hectares (lh) as on 10 July 2020, recording a rise of 44.13% compared to 402 lh in the corresponding week last year, according to latest sowing data released by the Agriculture Ministry.

**Equity Markets:** Trading for the week began on positive note as local indices logged modest gains on Monday. Intraday volatility was high. The Nifty managed to close above 10,800 mark after falling below that level in intraday trade. The barometer S&P BSE Sensex rose 99.36 points or 0.27% at 36,693.69. The Nifty 50 index added 47.15 points or 0.44% at 10,815.20.

**Corporate News:** Wipro will announce its Q1 result today, 14 July 2020. Adani Ports and Special Economic Zone (APSEZ) said that first ever containerized cargo export from India to Bangladesh using Inland Waterways has reached its destination Pangaon International Container Terminal, Dhaka on 12th July 2020. Godrej Industries said that the management committee of the board of directors of the company approved issuance of upto 7,500 Rated, Listed, Unsecured, Redeemable, Non-Convertible Debentures having face value of Rs ten lakh each, aggregating to Rs 750 crore on private placement basis. Adani Green Energy said it has increased its capacity by 50MW to 2,595 MW for the first quarter of fiscal 2021, on a sequential basis.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(124.1)	(19.7)	60.7
MF(INR cr)	(7.1)	(179.9)	(50.5)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	55,548	57,113	53,338
F&O(INR cr)	1,167,813	1,750,946	1,440,935

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.3	28.2	33.7
NSE VIX	25.3	25.8	35.3

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,089	(1.4) %	21.3 %	Energy	14,835	0.9 %	37.7 %
IT	15,819	1.6 %	31.3 %	Pharma	10,107	0.3 %	43.8 %
Metals	2,105	1.3 %	35.5 %	Finance	10,920	(1.5) %	22.1 %
Auto	7,084	0.6 %	52.1 %	PSU	1,465	(1.6) %	14.2 %
FMCG	31,215	1.3 %	18.4 %	Real Estate	203	(1.6) %	17.8 %

### 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>
Tech Mahin	600	5.5 %	17.4 %	Avenue Sup	2,234	(3.8) %	7.3 %
Adani Tran	251	4.2 %	32.6 %	DLF	143	(3.3) %	7.8 %
Bosch	13,859	4.0 %	50.1 %	Bajaj Fina	3,235	(2.4) %	45.7 %
HCL Techno	603	3.5 %	45.7 %	United Bre	1,008	(2.3) %	13.3 %
Hindalco I	169	3.4 %	84.7 %	HDFC Bank	1,080	(2.2) %	30.2 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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