



15 Jul.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,607	0.0 %	28.5 %
BSE SENSEX	36,033	(1.8) %	27.5 %
CNX BANK	21,392	0.0 %	17.5 %
CNX MIDCAP	15,052	0.0 %	31.2 %
CNX SMALLCAP	4,800	0.0 %	35.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,643	2.1 %	(6.6) %
S&P 500	3,198	1.3 %	(1.0) %
FTSE 100	6,180	0.1 %	(18.7) %
HANG SENG	25,478	(1.1) %	(10.7) %
NIKKEI	22,587	(0.9) %	(2.7) %
SHANGHAI COMPOSITE	3,415	(0.8) %	10.7 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.13	0.3 %	5.5 %
EUR/USD	1.14	0.7 %	1.4 %
GBP/USD	1.25	(0.6) %	(4.9) %
USD/JPY	107.27	0.3 %	(1.3) %
USD/AUD	1.44	(0.1) %	0.8 %
USD/SGD	1.39	0.0 %	3.5 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	(0.6) %	(34.1) %
Gold(INR/10g)	48,998	(0.2) %	25.7 %
Gold Comex(USD/oz)	1,815	(2.0) %	17.6 %
SILVER(INR/1Kg)	51,368	(0.3) %	11.5 %
Aluminium(USD/MT)	1,640	(1.5) %	(7.4) %
Copper(USD/MT)	6,490	(0.8) %	5.3 %

## 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:** The Labor Department said its consumer price index climbed by 0.6% in June after edging down by 0.1% in May. China's exports grew 0.5% on a yearly basis in June, data from the General Administration of Customs revealed Tuesday. Likewise, imports increased 2.7% annually. The trade surplus totalled \$46.42 billion versus \$62.9 billion surplus posted in May. Eurozone industrial production rebounded 12.4% on month in May, in contrast to an 18.2% decrease in April, as most of the factories reopened in member countries after the easing of coronavirus containment measures, data from Eurostat showed Tuesday. On a yearly basis, industrial production declined 20.9% versus a 28.7% fall in April. German economic sentiment fell to 59.3 in July from 63.4 in June, survey data from the ZEW - Leibniz Centre for European Economic Research showed Tuesday. Meanwhile, the assessment of the current situation improved slightly for the second time since January 2020. The current conditions index rose to -80.9 from -83.1 in the previous month. The UK economy grew in May after contracting the most on record in April, as measures to curb the spread of coronavirus were relaxed, data from the Office for National Statistics showed Tuesday. Gross domestic product grew 1.8% in May from April, when it was down 20.3%. Singapore's gross domestic product fell a seasonally adjusted 41.2% on quarter in the second quarter of 2020, the Ministry of Trade and Industry said in Tuesday's advance estimate, following the upwardly revised 3.3% contraction in the previous three months (originally -4.7%).

**Global Equities:** DOW rose in volatile trades after the deep slide in Monday's trading.

**Indian Economy:** Retail inflation based consumer price index stood at 6.09% in June, mainly on account of higher prices of food items, the government data showed on Monday. The last recorded CPI number came in March, at 5.84%. The government had released truncated CPI data for April and May in the backdrop of the lockdown to contain COVID-19 pandemic. Food inflation in June increased by 7.87%, according to Consumer Price Index (CPI) data. India's wholesale inflation shrank for the third month in a row in June while that in food articles prices rose, official data released by the commerce and industry ministry on Tuesday showed. Inflation as measured by the wholesale price index (WPI) contracted 1.81% in June. The deflation in May came in at 3.21%. The domestic Passenger vehicle sales fell to 1.05 lakh in June, dropping by 49.6% from 2.09 lakh units in the year-ago period, data released by the Society of Indian Automobile Manufacturers (SIAM) showed on Tuesday, according to media reports.

**Equity Markets:** Domestic equity benchmarks slumped on Tuesday, dragged by banks shares. The barometer S&P BSE Sensex tumbled 660.63 points or 1.80% at 36,033.06. The Nifty 50 index slumped 195.35 points or 1.81% at 10,607.35.

**Corporate News:** Reliance Industries (RIL) will be in focus as it holds its 43rd annual general meeting (AGM). Bharti Airtel has inked strategic alliance with Verizon to bring secure, world-class video conferencing solutions to businesses in India. Wipro Ltd reported its consolidated net profit for the June quarter was flat at Rs 2,390 crore. The company's consolidated revenue rose marginally to Rs 14,913 crore. The company's IT services EBIT margin improved to 19.1% as against 17.6% in the previous quarter and 18.4% in June 2019. Infosys, Bandhan Bank, Larsen & Toubro Infotech, Federal Bank, Minda Corporation, Rolta India, Uttam Galva Steels will be in focus ahead of earnings.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(11.2)	(18.8)	59.6
MF(INR cr)	(608.7)	(255.1)	(59.5)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	57,202	57,123	53,395
F&O(INR cr)	1,510,279	1,726,879	1,441,940

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.5	28.8	33.6
NSE VIX	26.6	25.9	35.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,392	(3.2) %	17.5 %	Energy	14,582	(1.7) %	35.4 %
IT	15,641	(1.1) %	29.8 %	Pharma	10,155	0.5 %	44.5 %
Metals	2,052	(2.5) %	32.1 %	Finance	10,652	(2.5) %	19.1 %
Auto	6,916	(2.4) %	48.5 %	PSU	1,419	(3.1) %	10.6 %
FMCG	30,933	(0.9) %	17.4 %	Real Estate	200	(1.5) %	16.0 %

### 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>
Biocon	438	5.5 %	57.2 %	Interglobe	955	(5.9) %	(4.4) %
Oracle Fin	2,903	3.0 %	51.1 %	IndusInd B	511	(5.3) %	49.2 %
Torrent Ph	2,421	2.6 %	23.6 %	Axis Bank	418	(5.1) %	16.5 %
Indraprast	415	2.2 %	6.2 %	Bandhan Ba	352	(4.8) %	80.8 %
Info Edg.(	2,896	2.2 %	43.8 %	Bosch	13,246	(4.4) %	43.4 %

### 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>					

..... End of Report .....