



15 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,854	0.0 %	6.6 %
BSE SENSEX	52,904	0.3 %	6.0 %
CNX BANK	35,668	0.0 %	5.3 %
CNX MIDCAP	27,623	0.0 %	14.5 %
CNX SMALLCAP	10,236	0.0 %	23.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,933	0.1 %	14.1 %
S&P 500	4,374	0.1 %	16.5 %
FTSE 100	7,091	(0.5) %	7.9 %
HANG SENG	27,787	(0.6) %	1.1 %
NIKKEI	28,608	(0.4) %	5.0 %
SHANGHAI COMPOSITE	3,529	(1.1) %	0.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.44	0.1 %	2.0 %
EUR/USD	1.18	(0.4) %	(3.6) %
GBP/USD	1.39	(0.3) %	1.5 %
USD/JPY	110.44	0.3 %	7.0 %
USD/AUD	1.34	0.2 %	3.2 %
USD/SGD	1.35	0.1 %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	(2.8) %	53.6 %
Gold(INR/10g)	47,965	0.3 %	(6.0) %
Gold Comex(USD/oz)	1,830	1.1 %	(6.1) %
SILVER(INR/1Kg)	69,007	(0.4) %	0.2 %
Aluminium(USD/MT)	2,509	1.3 %	24.6 %
Copper(USD/MT)	9,309	(0.0) %	17.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.4	(0.1) %	0.4 %

Global Economy: The US Fed Federal Reserve Chair Jerome Powell said the US economy was still a ways off from levels the central bank wanted to see before tapering its monetary support. Powell also said he is confident recent price hikes are associated with the country's post-pandemic reopening and will fade. Labor Department said its producer price index for final demand surged up by 1% in June after rising by 0.8% in May. The Beige Book noted the US economy strengthened further from late May to early July, with the pace of growth described as moderate to robust. The transportation, travel and tourism, manufacturing, and non-financial services sectors reported above-average growth, while energy markets improved slightly, and agriculture had mixed results. Eurozone industrial production fell 1% on a monthly basis in May, reversing a revised 0.6% rise in April, data from Eurostat revealed on Wednesday. Year-on-year, industrial production growth eased to 20.5% in May from 39.4% in April. All components of production, except durable consumer goods, declined in May from April. UK consumer price inflation rose to 2.5% in June from 2.1% in May, data from the Office for National Statistics showed on Wednesday. The annual growth was largely driven by prices of food, second-hand cars and clothing and footwear. Japan's industrial production fell a seasonally adjusted 6.5% month-on-month in May, the Ministry of Economy, Trade and Industry said on Wednesday. In the initial estimate, output decreased 5.9%. Shipment declined 5.5% monthly in May and inventories fell 1.1%. Meanwhile, inventory ration increased by 1.3%. On a yearly basis, industrial production grew 21.1% in May. In the initial estimate, output rose 22%. Australia consumer confidence remains firm in July, the latest survey from Westpac Bank showed on Wednesday as its sentiment index gained 1.5% to a score of 108.8, up from 107.2 in June.

Global Equities: The DOW stayed supported amid and overall choppy session for the US stocks.

Indian Economy: Provisional figures of Wholesale Price Index (WPI) revealed that the annual rate of inflation is 12.07% for the month of June,2021 (over June,2020) as compared to-1.81% in June 2020. The high rate of inflation in June 2021 is primarily due to low base effect and rise in prices of mineral oils viz. petrol, diesel (HSD), naphtha, ATF, furnace oil etc, and manufactured products like basic metal, food products, chemical products etc as compared the corresponding month of the previous year. The month over month change in WPI index for the month of June 2021 (as compared to May 2021) was 0.75 %.

Equity Markets: The benchmark indices ended with decent gains on Wednesday. The Nifty closed above the 15,800 mark. IT shares rallied while banks and financial stocks declined.

Corporate News: Infosys' consolidated net profit grew 2.3% to Rs 5,195 crore on 6% increase in revenue to Rs 27,896 crore in Q1 June 2021 over Q4 March 2021. On a year-on-year basis, net profit rose 22.7% and revenue increased 17.9% in Q1 June 2021. The Q1 result was declared after trading hours yesterday, 14 July 2021. The IT major's operating profit stood at Rs 6,603 crore in Q1 June 2021, rising 2.5% quarter-on-quarter (Q-o-Q) and increasing 23.1% year-on-year (Y-o-Y). Operating margin for the quarter was robust at 23.7%, an increase of 1% YoY and decline of 0.8% QoQ. TCS on Wednesday announced plans to expand its operations in Arizona, investing more than \$300 million by 2026 and hiring more than 220 employees by 2023. Marico has entered into Share Subscription Agreement and Shareholders agreement with Apcos Naturals Private Limited.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	9.4	(37.9)	6.2
MF(INR cr)	291.9	339.3	218.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	62,470	62,888	72,457
F&O(INR cr)	4,794,997	4,931,213	4,591,441

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.1	16.0	17.8
NSE VIX	12.6	12.6	17.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,668	(0.0) %	5.3 %	Energy	19,525	(0.2) %	5.4 %
IT	29,340	3.2 %	12.9 %	Pharma	14,507	0.3 %	17.2 %
Metals	5,300	0.1 %	26.5 %	Finance	16,823	(0.2) %	5.7 %
Auto	10,468	(0.3) %	4.4 %	PSU	2,480	(0.5) %	12.0 %
FMCG	36,073	(0.1) %	3.4 %	Real Estate	377	(0.9) %	12.3 %

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>
Wipro	562	7.0 %	34.9 %	UPL	820	(1.5) %	25.4 %
L & T Info	4,215	4.9 %	2.5 %	Maruti Suz	7,327	(1.4) %	5.8 %
Gland Phar	3,831	4.0 %	55.2 %	Piramal En	2,290	(1.4) %	28.6 %
Biocon	399	3.0 %	(2.7) %	Adani Tran	974	(1.3) %	(2.5) %
Tech Mahin	1,079	2.7 %	8.7 %	Indus Towe	237	(1.1) %	(7.4) %

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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