



17 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,740	0.0 %	30.1 %
BSE SENSEX	36,472	1.2 %	29.0 %
CNX BANK	21,597	0.0 %	18.6 %
CNX MIDCAP	15,034	0.0 %	31.1 %
CNX SMALLCAP	4,789	0.0 %	35.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,735	(0.5) %	(6.3) %
S&P 500	3,216	(0.3) %	(0.5) %
FTSE 100	6,251	(0.7) %	(17.8) %
HANG SENG	24,971	(2.0) %	(12.5) %
NIKKEI	22,770	(0.8) %	(1.9) %
SHANGHAI COMPOSITE	3,210	(4.5) %	4.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.97	(0.2) %	5.3 %
EUR/USD	1.14	0.3 %	1.7 %
GBP/USD	1.26	0.2 %	(4.7) %
USD/JPY	107.12	(0.1) %	(1.4) %
USD/AUD	1.43	(0.4) %	0.4 %
USD/SGD	1.39	(0.1) %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(1.1) %	(33.4) %
Gold(INR/10g)	49,077	0.0 %	25.9 %
Gold Comex(USD/oz)	1,800	(0.9) %	16.7 %
SILVER(INR/1Kg)	51,971	(0.2) %	12.8 %
Aluminium(USD/MT)	1,627	(1.5) %	(8.2) %
Copper(USD/MT)	6,385	(1.9) %	3.6 %

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 US retail sales soared by 7.5% in June after skyrocketing by an upwardly revised 18.2% in May. After reporting an unexpected expansion in Philadelphia-area manufacturing activity in the previous month, the Federal Reserve Bank of Philadelphia released a report on Thursday showing a modest slowdown in the pace of growth in the month of July. NAHB/Wells Fargo US Housing Market Index surged up to 72 in July after jumping to 58 in June. The US Labor Department said initial jobless claims slipped to 1.300 million, a decrease of 10,000 from the previous week's revised level 1.310 million. The ECB left its key interest rates and the size of asset purchases unchanged as policymakers weigh the effect of the previous actions. The main refi rate was left unchanged at a record low zero and the deposit rate at -0.50% while the lending rate was kept at 0.25%. The ECB Governing Council expects the key ECB interest rates to remain at their present or lower levels until it has seen the inflation outlook robustly converge to a level sufficiently close to, but below, 2% within its projection horizon. China's gross domestic product surged a seasonally adjusted 11.5% on quarter in the second quarter of 2020, the National Bureau of Statistics said on Thursday, following the 9.8% decline in the previous three months. On a yearly basis, GDP advanced 3.2 after tumbling 6.8% in the three months prior. Euro area trade surplus rose to a seasonally adjusted EUR 8 billion in May from EUR 1.6 billion in April, as the relaxation of coronavirus containment measures boosted both exports and imports, data from Eurostat revealed Thursday. Exports increased 7.9% month-on-month in May and imports grew 3.2%. UK unemployment remained unchanged in three months to May. In three months to May, the jobless rate was largely unchanged at 3.9%.

Global Equities: US stocks witnessed selling pressure after gains in previous session. European markets turned lower on growth worries.

Indian Economy: India's merchandise trade balance swung to a surplus in June, the first in the last decade, as imports plummeted amid weak demand and supply disruptions due to the coronavirus, or Covid-19, pandemic, data from the Ministry of Commerce & Industry showed. Contracting for the fourth straight month, India's exports declined by 12.41% to USD 21.91 billion in June mainly due to drop in shipments of petroleum, textiles, engineering goods, and gems and jewellery items. India's imports plunged 47.59% to USD 21.11 billion in June, leaving a trade surplus of USD 0.79 billion, compared to a deficit of USD 15.28 billion in the same month of the last year.

Equity Markets: Amid bouts of volatility, the equity benchmarks ended near the day's high on Thursday. IT shares were the top contributors, followed by pharma and private bank stocks. Trading was volatile due to expiry of weekly index options.

Corporate News: The Department of Telecommunications (DoT) has withdrawn a demand of over Rs 2.3 lakh crore it had made on state-owned gas utility GAIL India Ltd and explorer Oil India Ltd (OIL) in past telecom dues, the company informed stock exchanges. Jet fuel or ATF price on Thursday was hiked by 1.5%, the fourth increase in six weeks, while petrol and diesel rates were unchanged. Aviation Turbine Fuel (ATF) price was hiked by Rs 635.47 per kilolitre (kl), or 1.5 per cent, to Rs 42,628.28 per kl in Delhi. ICICI Prudential Life Insurance Company will be in focus as FPIs raised stake in the company to 15.06% in the June quarter from 13.34% in March quarter.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(4.7)	(35.0)	54.7
MF(INR cr)	(808.5)	(316.6)	(70.5)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	64,669	58,764	53,760
F&O(INR cr)	3,650,219	1,922,440	1,483,019

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.0	28.6	33.5
NSE VIX	25.4	25.8	34.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,597	1.2 %	18.6 %	Energy	14,340	0.3 %	33.1 %
IT	16,926	2.8 %	40.5 %	Pharma	10,382	1.7 %	47.8 %
Metals	2,071	0.7 %	33.3 %	Finance	10,708	0.9 %	19.7 %
Auto	7,016	1.2 %	50.6 %	PSU	1,406	0.4 %	9.6 %
FMCG	31,182	0.1 %	18.3 %	Real Estate	196	0.0 %	13.7 %

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>
Infosys	911	9.6 %	51.1 %	Bharti Inf	190	(6.8) %	22.5 %
B P C L	394	6.6 %	30.0 %	Avenue Sup	2,007	(6.5) %	(3.6) %
Oracle Fin	3,153	5.7 %	64.1 %	Tech Mahin	599	(2.6) %	17.3 %
Cipla	675	5.7 %	63.0 %	ITC	194	(2.4) %	16.5 %
Muthoot Fi	1,132	5.0 %	87.2 %	United Bre	977	(2.2) %	9.8 %

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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