



18 Jul.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,613	0.1 %	9.6 %
BSE SENSEX	80,717	0.1 %	9.1 %
CNX BANK	52,397	(0.1) %	10.1 %
CNX MIDCAP	57,664	(0.0) %	17.9 %
CNX SMALLCAP	19,062	0.1 %	20.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	41,198	0.6 %	9.2 %
S&P 500	5,588	(1.4) %	17.8 %
FTSE 100	8,187	0.3 %	6.0 %
HANG SENG	17,739	0.1 %	5.7 %
NIKKEI	41,098	(0.4) %	23.5 %
SHANGHAI COMPOSITE	2,963	(0.5) %	0.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	91.08	9.1 %	9.7 %
EUR/USD	1.00	(8.3) %	(9.4) %
GBP/USD	1.19	(8.3) %	(6.5) %
USD/JPY	172.21	9.0 %	22.1 %
USD/AUD	1.61	9.2 %	9.6 %
USD/SGD	1.46	9.1 %	10.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	81	(1.4) %	14.7 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,471	1.8 %	18.9 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,377	(1.1) %	1.7 %
Copper(USD/MT)	9,566	(1.2) %	13.5 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.2	(0.1) %	0.3 %

**Global Economy:** A report released by the Federal Reserve on Wednesday showed industrial production in the U.S. increased by more than expected in the month of June. The Fed said industrial production climbed by 0.6 percent in June after jumping by 0.9 percent in May. The Commerce Department released a report on Wednesday showing a significant rebound by new residential construction in the U.S. in the month of June. The report said housing starts shot up by 3.0 percent to an annual rate of 1.353 million in June after plunging by 4.6 percent to a revised rate of 1.314 million in May. Eurozone inflation slowed as initially estimated in June but the European Central Bank is expected to hold its benchmark rate on Thursday as underlying inflation remains too high. The harmonized index of consumer prices rose 2.5 percent on a yearly basis, which was slower than the 2.6 percent growth posted in May. Core inflation that excludes prices of energy, food, alcohol and tobacco, held steady at 2.9 percent in June. UK inflation remained unchanged at the official target in June but the stability of services inflation reduced chances of a rate cut in August. The consumer price index grew 2.0 percent on a yearly basis, the same pace of growth as seen in May, the Office for National Statistics reported. On a monthly basis, the CPI edged up 0.1 percent. Core inflation remained unchanged at 3.5 percent. Japan posted a merchandise trade surplus of 224.038 billion yen in June, the Ministry of Finance said on Thursday.

**Global Indices:** The Dow ended with a gain of 243.60 points or 0.59 percent at 41,198.08. The S&P 500 settled with a loss of 78.93 points or 1.39 percent at 5,588.27, while the Nasdaq dropped 512.42 points or 2.77% to 17,996.92.

**Indian Economy:** The International Monetary Fund (IMF) on Tuesday revised upward its projections for India and said the country is now expected to grow by 7% in 2024-25, compared to 6.8% projected in April. "The forecast for growth in India has been revised upward, to 7 per cent, this year, with the change reflecting carryover from upward revisions to growth in 2023 and improved prospects for private consumption, particularly in rural areas," the International Monetary Fund said in its latest edition of the world economic outlook update.

**Equity Market:** In the barometer index, the barometer index, the S&P BSE Sensex, rose 51.69 points or 0.06% to 80,716.55. The Nifty 50 index added 26.30 points or 0.11% to 24,613.00.

**Corporate News:** Asian Paints reported a 24.6 per cent decline in net profit to Rs 1,186.8 crore for Q1FY25, with revenue decreasing 2.3 per cent to Rs 8,969.7 crore. EBITDA dropped 20.2 per cent to Rs 1,693.8 crore, resulting in a margin decrease to 18.9 per cent from 23.1 per cent on a year-on-year (Y-o-Y) basis. Bharti Airtel added 12.50 lakh subscribers in May 2024, a 66.2 per cent increase from the previous month, holding a 33.17 per cent market share of wireless subscribers as of May 2024.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	399.4	244.9	24.8
MF(INR cr)	(45.7)	503.3	1,592.8

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	134,052	149,357	134,957
F&O(INR cr)	50,783,930	35,190,414	37,029,557

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.2	339.2	62.3
NSE VIX	14.2	13.7	15.6

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	52,397	(0.1) %	10.1 %	Energy	43,204	(0.2) %	9.4 %
IT	39,142	0.6 %	11.7 %	Pharma	20,765	(0.4) %	8.1 %
Metals	9,722	(0.1) %	13.5 %	Finance	23,648	(0.2) %	11.6 %
Auto	25,483	0.2 %	19.2 %	PSU	7,406	(0.2) %	4.1 %
FMCG	60,645	1.0 %	12.5 %	Real Estate	1,126	1.7 %	19.8 %

### 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>
Life Insur	1,108	4.5 %	14.2 %	Zomato Ltd	217	(5.1) %	17.9 %
Coal India	512	3.0 %	15.9 %	Hind.Aeron	5,329	(3.2) %	56.6 %
B P C L	316	2.7 %	5.2 %	Jio Financ	344	(3.1) %	(3.6) %
Hind. Unil	2,688	2.6 %	17.6 %	REC Ltd	618	(2.5) %	34.1 %
Tata Consu	1,176	2.4 %	8.2 %	Shriram Fi	2,814	(2.4) %	15.7 %

### 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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