



19 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,923	(0.0) %	7.1 %
BSE SENSEX	53,140	(0.0) %	6.2 %
CNX BANK	35,752	(0.4) %	5.6 %
CNX MIDCAP	27,851	0.3 %	15.5 %
CNX SMALLCAP	10,447	1.1 %	26.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,688	(0.9) %	13.3 %
S&P 500	4,327	(0.8) %	15.2 %
FTSE 100	7,008	(0.1) %	6.6 %
HANG SENG	28,005	0.0 %	1.9 %
NIKKEI	28,003	(1.0) %	2.7 %
SHANGHAI COMPOSITE	3,539	(0.7) %	1.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.41	(0.0) %	2.0 %
EUR/USD	1.18	0.1 %	(3.6) %
GBP/USD	1.38	(0.1) %	1.4 %
USD/JPY	109.89	(0.4) %	6.5 %
USD/AUD	1.34	0.3 %	3.5 %
USD/SGD	1.35	(0.0) %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	0.2 %	50.8 %
Gold(INR/10g)	48,182	(0.0) %	(5.5) %
Gold Comex(USD/oz)	1,833	0.1 %	(6.0) %
SILVER(INR/1Kg)	68,924	(0.5) %	0.1 %
Aluminium(USD/MT)	2,493	(0.1) %	23.8 %
Copper(USD/MT)	9,397	0.5 %	18.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.0 %	0.4 %

Global Economy: University of Michigan said that the US consumer sentiment index slumped to 80.8 in July from 85.5 in June. One-year inflation expectations jumped to 4.8% in July from 4.2 in%, while five-year inflation expectations edged up to 2.9% from 2.8%. The US Commerce Department said business inventories rose by 0.5% in May following a revised 0.1% uptick in April. The increase in business inventories came as wholesale inventories jumped by 1.3% and manufacturing inventories advanced by 0.9%, more than offsetting a 0.8% fall in retail inventories. Retail sales in the US increased in the month of June, according to a report released by the Commerce Department on Friday. The Commerce Department said retail sales climbed by 0.6% in June after plunging by a revised 1.7% in May. Eurozone inflation eased to 1.9% in June from 2% in the prior month, final data from Eurostat showed on Friday. The inflation rate had exceeded the European Central Bank's target of "below, but close to" 2% in May for the first time since 2018. Euro area trade surplus fell to a seasonally adjusted EUR 9.4 billion in May from EUR 13.4 billion in April, official data from Eurostat revealed on Friday. Exports dropped 1.5% on a monthly basis in May, while imports grew 0.7%. On an unadjusted basis, the trade balance showed a surplus of EUR 7.5 billion in May compared to EUR 8.9 billion surplus in the same period last year. The Policy Board of the Bank of Japan, at the Monetary Policy Meeting (MPM) held today, decided by an 8-1 majority vote, to hold the interest rate at -0.1% on current accounts that financial institutions maintain at the central bank.

Global Equities: The US stocks fell on Friday with DOW sliding 0.90% as traders booked profits on tepid outlook for consumer sentiments.

Indian Economy: Indian's services exports are expected to grow 10 per cent in 2021-22 due to healthy growth of sectors such as professional and management consulting, audio visual, freight transport, and telecommunications, according to Services Export Promotion Council (SEPC). Improvement in areas like single-window clearances, quicker land acquisition and readiness by states to roll-out of labour codes are needed to enhance ease of doing business in India, NITI Aayog CEO Amitabh Kant said.

Equity Markets: The key equity benchmarks ended almost flat on Friday, as investors booked profits at record high levels. Selling in IT and banks shares put pressure on indices. Shares of pharma and realty companies advanced in anticipation of strong Q1 earnings.

Corporate News: HDFC Bank reported a higher standalone profit at Rs 7,729.64 crore in Q1FY22 against Rs 6,658.62 crore in Q1FY21. Its net interest income rose to Rs 17,009 crore from Rs 15,665.42 crore YoY. L&T Finance Holdings reported profit at Rs 177.85 crore in Q1FY22 against Rs 148.31 crore in Q1FY21. Its revenue fell to Rs 3,140.12 crore from Rs 3,387.06 crore YoY. Tata Power Company joined hands with HPCL to set up electric vehicle charging stations at its petrol pumps across the country.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	51.4	(41.2)	4.4
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)	69,018	63,737	72,333
F&O(INR cr)	2,826,422	5,121,371	4,632,009

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	16.1	17.7
NSE VIX	11.7	12.5	17.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,752	(0.4) %	5.6 %	Energy	19,568	0.7 %	5.7 %
IT	29,400	(1.1) %	13.2 %	Pharma	14,635	1.2 %	18.2 %
Metals	5,391	1.0 %	28.7 %	Finance	16,884	(0.2) %	6.1 %
Auto	10,428	0.0 %	4.0 %	PSU	2,463	(0.4) %	11.2 %
FMCG	36,254	0.2 %	4.0 %	Real Estate	398	1.1 %	18.4 %

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>
Gland Phar	3,957	5.7 %	60.3 %	HCL Techno	1,005	(3.3) %	0.2 %
Adani Tran	1,017	3.7 %	1.7 %	Bandhan Ba	309	(3.3) %	(11.9) %
United Bre	1,448	3.7 %	16.6 %	L & T Info	4,289	(3.0) %	4.3 %
Havells In	1,078	3.6 %	1.8 %	Info Edg.(5,103	(2.1) %	19.7 %
NMDC	179	3.5 %	29.1 %	Eicher Mot	2,617	(1.9) %	(0.5) %

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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