



19 Jul.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,801	0.8 %	10.4 %
BSE SENSEX	81,343	0.8 %	9.9 %
CNX BANK	52,621	0.4 %	10.6 %
CNX MIDCAP	57,111	(1.0) %	16.8 %
CNX SMALLCAP	18,829	(1.2) %	19.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	40,665	(1.3) %	7.8 %
S&P 500	5,545	(0.8) %	16.9 %
FTSE 100	8,205	0.2 %	6.3 %
HANG SENG	17,778	0.2 %	5.9 %
NIKKEI	40,126	(2.4) %	20.5 %
SHANGHAI COMPOSITE	2,977	0.5 %	0.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.57	(8.3) %	0.6 %
EUR/USD	1.09	8.9 %	(1.3) %
GBP/USD	1.30	8.9 %	1.8 %
USD/JPY	158.51	(8.0) %	12.4 %
USD/AUD	1.48	(7.8) %	1.0 %
USD/SGD	1.34	(8.1) %	1.9 %

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)	2,468	(0.1) %	18.7 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,363	(0.6) %	1.1 %
Copper(USD/MT)	9,533	(0.3) %	13.1 %

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	0.0 %	0.3 %

Global Economy: The Conference Board released a report on Thursday showing a modest decrease by its reading on leading U.S. economic indicators in the month of June. The report said the leading economic index edged down by 0.2 percent in June after falling by a revised 0.4 percent in May. Meanwhile, the Conference Board said the leading economic index fell by 1.9 percent in the first half of the year, a smaller decrease compared to the 2.9 percent contraction over the second half of last year. The European Central Bank left its key interest rates unchanged on Thursday, as expected, after lowering them for the first time in five years in the previous session. The Governing Council held the main refinancing rate at 4.25 percent, the deposit facility rate at 3.75 percent and the marginal lending rate at 4.50 percent. Germany's building permits posted another sharp decline in May, reflecting the ongoing weakness in the construction sector, data from Destatis showed. The number of permits for construction of apartments shrank 24.2 percent in May from the last year, which was worse than the 17.0 percent decrease posted in April. UK wage growth softened in the three months to May period suggesting that the labor market cooled further and revived hopes of interest rate cuts. The unemployment rate came in at 4.4 percent in March to May period, unchanged from the preceding three months, the Office for National Statistics reported.

Global Indices: The major averages all finished the day firmly in negative territory. The Dow tumbled 533.06 points or 1.3 percent to 40,665.02, the Nasdaq fell 125.70 points or 0.7 percent to 17,871.22 and the S&P 500 slid 43.68 points or 0.8 percent to 5,544.59.

Indian Economy: India's Retail sales edged up 5% in June 2024 compared to May 2023, according to the survey by Retailers Association of India (RAI). This marked a healthy improvement on a monthly basis, as sales had edged by an annual 3% in May. Sales in South region rose 7% while sales in North recorded a rise of 5%. RAI also noted that at 8%, Quick Service Restaurants led the category wise growth trends.

Equity Market: The S&P BSE Sensex surged 626.91 points or 0.78% to 81,343.46. The Nifty 50 index added 187.85 points or 0.76% to 24,800.85. Both the indices attained record closing levels.

Corporate News: L&T Technology Services retained its full-year revenue growth forecast of 8 per cent to 10 per cent but missed quarterly revenue expectations on Thursday due to prolonged weakness in its key US market. The company's revenue grew about 7 per cent to Rs 2,462 crore (\$294.4 million) for the three months ending June 30. JSW Infrastructure's Q1FY25 profit slips 8.9 per cent Y-o-Y to Rs 292.4 crore. Revenue jumps 15 per cent to Rs 1,009.8 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	198.7	241.1	27.3
MF(INR cr)	(149.0)	493.9	1,591.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	157,885	150,013	135,267
F&O(INR cr)	51,826,293	36,470,097	37,229,513

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.5	312.2	61.7
NSE VIX	14.5	13.8	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	52,621	0.4 %	10.6 %	Energy	43,237	0.1 %	9.5 %
IT	40,010	2.2 %	14.2 %	Pharma	20,768	0.0 %	8.1 %
Metals	9,637	(0.9) %	12.5 %	Finance	23,784	0.6 %	12.2 %
Auto	25,577	0.4 %	19.6 %	PSU	7,407	0.0 %	4.1 %
FMCG	61,225	1.0 %	13.6 %	Real Estate	1,123	(0.3) %	19.4 %

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>
LTIMindtre	5,757	3.5 %	17.9 %	Trent	5,309	(6.0) %	36.6 %
TCS	4,316	3.3 %	10.2 %	Hind.Aeron	5,016	(5.9) %	47.4 %
Cholaman.I	1,450	3.0 %	22.3 %	Siemens	7,121	(4.7) %	30.4 %
O N G C	332	2.8 %	22.9 %	A B B	7,893	(4.1) %	21.3 %
Torrent Ph	3,058	2.8 %	14.3 %	Bharat Ele	314	(3.9) %	48.5 %

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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