



20 Jul.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,902	1.5 %	32.1 %
BSE SENSEX	37,020	1.5 %	31.0 %
CNX BANK	21,967	1.7 %	20.6 %
CNX MIDCAP	15,242	1.4 %	32.9 %
CNX SMALLCAP	4,852	1.3 %	37.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,672	(0.2) %	(6.5) %
S&P 500	3,225	0.3 %	(0.2) %
FTSE 100	6,290	0.6 %	(17.3) %
HANG SENG	25,089	0.5 %	(12.1) %
NIKKEI	22,696	(0.3) %	(2.2) %
SHANGHAI COMPOSITE	3,214	0.1 %	4.2 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.78	(0.3) %	5.0 %
EUR/USD	1.14	0.1 %	1.8 %
GBP/USD	1.26	(0.0) %	(4.8) %
USD/JPY	107.14	0.0 %	(1.4) %
USD/AUD	1.43	(0.0) %	0.4 %
USD/SGD	1.39	(0.1) %	3.3 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(0.4) %	(33.7) %
Gold(INR/10g)	48,942	(0.3) %	25.5 %
Gold Comex(USD/oz)	1,814	0.8 %	17.6 %
SILVER(INR/1Kg)	51,575	(0.8) %	12.0 %
Aluminium(USD/MT)	1,618	(0.6) %	(8.7) %
Copper(USD/MT)	6,455	1.1 %	4.7 %

## 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 University of Michigan released a report on Friday showing an unexpected deterioration in US consumer sentiment in the month of July. The preliminary report said the consumer sentiment index tumbled to 73.2 in July after jumping to 78.1 in June. The US housing starts soared by 17.3% to an annual rate of 1.186 million in June after jumping by 8.2% to an upwardly revised rate of 1.011 million in May. Eurozone inflation rose to 0.3% in June from a near-four year low of 0.1 percent logged in May, as many coronavirus containment measures have been gradually lifted, final data from Eurostat showed Friday. Headline inflation continued to remain well below the European Central Bank's target of "below, but close to 2 percent. Non-oil domestic exports (NODX) in Singapore were up a seasonally adjusted 0.5% on month in June, Statistics Singapore said on Friday - coming in at SGD14.2 billion. This came after the 4.6% drop in May. On a yearly basis, NODX jumped 16.1% after falling 4.6% in the previous month.

**Global Equities:** The US stocks showed choppy moves on Friday with the DOW ending down 0.20%.

**Indian Economy:** Ministry of Agriculture & Farmers Welfare noted that as on 17.07.2020, total kharif crops have been sown on 691.86 lakh hectare (ha) area against 570.86 lakh ha area during the corresponding period of last year, thus increase in area coverage by 21.20% compared to last year in the country. The Scheduled commercial banks (SCBs) credit growth eased on sequential basis to 6.1% YoY to Rs 10291611 crore as on 03 July 2020, compared with 6.2% growth a fortnight ago. The credit growth has also decelerated from 12.1% at end July 2019. Non-food credit, accounting for 99.2% of the share of the total credit, recorded a growth of 6.0% , YoY, at Rs 10205724 crore as on 03 July 2020 as against a rise of 6.1% fortnight ago and 12.1% rise a year ago.

**Equity Markets:** Key barometers ended with strong gains on Friday, extending their winning streak for third consecutive session. Significant buying in the final hour of trade pushed the indices near their day's high. Positive global cues supported buying in domestic shares. The barometer S&P BSE Sensex surged 548.46 points or 1.50% at 37,020.14. The Nifty 50 index jumped 161.75 points or 1.51% at 10,901.70. Both these indices jumped over 2.7% in three sessions.

**Corporate News:** Leading lender HDFC Bank on Saturday reported a net profit of Rs 6,658.62 crore for the quarter ended June 30, recording an increase of 19.58% compared to the corresponding period a year ago, driven by higher interest income and lower costs. HDFC Bank - the country's largest private sector lender by market value - said its net revenue (net interest income plus other income) stood at Rs 34,453.28 crore in the April-June period, up 6.46% compared to quarter ended June 30, 2019. HDFC Bank said its net interest income (NII) - or the difference between interest earned and interest paid - increased 17.84% to Rs 15,665.42 crore in the June quarter. ACC, SBI Cards and Payment Services, Bombay Dyeing, Den Networks will be in focus ahead of latest earnings. , Eicher Motors expects increased demand for two wheelers as people would be wary of using public transport amid the coronavirus pandemic, according to the company's annual report.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(159.8)	(45.4)	51.7
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)	62,013	59,034	53,876
F&O(INR cr)	1,075,163	1,857,265	1,477,355

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.7	28.4	33.4
NSE VIX	24.2	25.7	34.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,967	1.7 %	20.6 %	Energy	14,942	4.2 %	38.7 %
IT	16,821	(0.6) %	39.6 %	Pharma	10,472	0.9 %	49.0 %
Metals	2,103	1.6 %	35.4 %	Finance	10,916	1.9 %	22.1 %
Auto	7,137	1.7 %	53.2 %	PSU	1,432	1.8 %	11.6 %
FMCG	31,439	0.8 %	19.3 %	Real Estate	196	0.4 %	14.1 %

### 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>
B P C L	444	12.7 %	46.5 %	Hindalco I	162	(2.3) %	76.9 %
H P C L	224	6.8 %	21.7 %	Britannia	3,785	(1.8) %	47.6 %
Muthoot Fi	1,203	6.3 %	99.0 %	Oracle Fin	3,096	(1.8) %	61.2 %
O N G C	80	5.5 %	22.2 %	Abbott Ind	15,263	(1.8) %	(2.2) %
NMDC	86	5.1 %	9.8 %	TCS	2,201	(1.5) %	28.8 %

### 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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