



20 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,752	(1.1) %	6.0 %
BSE SENSEX	52,553	(1.1) %	5.0 %
CNX BANK	35,079	(1.9) %	3.6 %
CNX MIDCAP	27,625	(0.8) %	14.5 %
CNX SMALLCAP	10,451	0.0 %	26.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,962	(2.1) %	11.0 %
S&P 500	4,258	(1.6) %	13.4 %
FTSE 100	6,844	(2.3) %	4.1 %
HANG SENG	27,490	(1.8) %	0.1 %
NIKKEI	27,653	(1.3) %	1.4 %
SHANGHAI COMPOSITE	3,539	(0.0) %	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)	47,931	(0.5) %	(6.0) %
Gold Comex(USD/oz)	1,833	0.1 %	(6.0) %
SILVER(INR/1Kg)	67,670	(1.8) %	(1.7) %
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: The US officially climbed out of a recession in April 2020, concluding a pandemic-driven economic contraction that lasted two months, making it the shortest on record, according to the National Bureau of Economic Research. The recession ended the country's longest recorded economic expansion, which began in June 2009 and lasted 128 months, according to the bureau's Business Cycle Dating Committee. The US National Association of Home Builders said its NAHB/Wells Fargo Housing Market Index edged down to 80 in July from 81 in June. With the drop, the housing market index slipped to its lowest level since hitting 78 in August of 2020. The component measuring traffic of prospective buyers tumbled to 65 in July from 71 in June. Japan's government retained its economic assessment for the second straight month in July, the Cabinet Office said in its monthly report, released Monday. The Japanese economy showed weakness in some components further, although it remains in picking up in a severe situation due to the Coronavirus.

Global Equities: The US stocks were hit hard on Monday following gloomy global cues and tested nearly one month low.

Indian Economy: Demand for air travel recovered during the month of June after falling to 30,000 daily passengers during the month of May due to a devastating second wave of COVID infection, data from DGCA noted. With India's forex reserves at \$608.99 billion as on June 25, 2021 stood, India has emerged as the fifth largest foreign exchange reserves holder in the world after China, Japan, Switzerland and Russia. This was stated by Minister of State for Finance Pankaj Chaudhary in a written reply to a question in the Lok Sabha. India's foreign exchange reserves position is comfortable in terms of import cover of more than 18 months and provides cushion against unforeseen external shocks. Government and RBI are closely monitoring the emerging external position calibrating policies or regulations to support robust macroeconomic growth. The Minister said that RBI takes regular steps for diversification of forex reserves by scaling up operations in forex swap and repo markets, acquisition of gold and exploring new markets/products, while adhering to safety and liquidity standards.

Equity Markets: Equity indices ended with sharp losses amid negative global cues on Monday. The Nifty slipped below 15800 mark but managed to hold above the 15,750 level. Banks and financial shares tumbled. Pharma and realty shares bucked weak market trend.

Corporate News: HCL Technologies reported higher consolidated profit at Rs 3,214 crore in Q1FY22 against Rs 2,962 crore in Q4FY21 and its revenue rose to Rs 20,068 crore from Rs 19,642 crore QoQ. The company maintained FY22 constant currency revenue growth guidance of double digits and EBIT margin guidance of 19-21%. ACC reported sharply higher profit at Rs 533.8 crore in Q2CY21 against Rs 268 crore in Q2CY20. Revenue jumped to Rs 3,884.8 crore from Rs 2,600.8 crore YoY. Vedanta on Monday said its aluminium vertical has invited partnerships from cement producers to use its by-products for manufacturing low-carbon cement.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(56.8)	(42.5)	3.5
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)	74,115	64,535	72,357
F&O(INR cr)	4,436,549	5,068,693	4,629,368

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	16.1	17.7
NSE VIX	12.7	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	35,079	(1.9) %	3.6 %	Energy	19,517	(0.3) %	5.4 %
IT	29,264	(0.5) %	12.6 %	Pharma	14,670	0.2 %	18.5 %
Metals	5,318	(1.4) %	26.9 %	Finance	16,556	(1.9) %	4.1 %
Auto	10,311	(1.1) %	2.9 %	PSU	2,435	(1.1) %	10.0 %
FMCG	36,180	(0.2) %	3.7 %	Real Estate	399	0.4 %	18.9 %

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>
Alkem Lab	3,449	2.9 %	24.3 %	Adani Tran	968	(4.8) %	(3.1) %
Apollo Hos	3,884	2.8 %	34.2 %	Indus Towe	230	(4.6) %	(10.1) %
L & T Info	4,380	2.1 %	6.5 %	HDFC Bank	1,471	(3.4) %	(1.1) %
NTPC	121	1.9 %	12.5 %	HDFC AMC	2,992	(3.3) %	1.0 %
H P C L	272	1.5 %	14.5 %	Adani Gree	979	(2.9) %	(15.6) %

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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