



21 Jul.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,022	1.1 %	33.5 %
BSE SENSEX	37,419	1.1 %	32.4 %
CNX BANK	22,322	1.6 %	22.6 %
CNX MIDCAP	15,389	1.0 %	34.2 %
CNX SMALLCAP	4,908	1.2 %	38.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,681	0.0 %	(6.5) %
S&P 500	3,252	0.8 %	0.7 %
FTSE 100	6,262	(0.5) %	(17.7) %
HANG SENG	25,058	(0.1) %	(12.2) %
NIKKEI	22,717	0.1 %	(2.1) %
SHANGHAI COMPOSITE	3,314	3.1 %	7.4 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.61	(0.5) %	4.8 %
EUR/USD	1.14	0.3 %	2.0 %
GBP/USD	1.26	0.4 %	(4.4) %
USD/JPY	107.25	0.1 %	(1.3) %
USD/AUD	1.43	(0.2) %	0.2 %
USD/SGD	1.39	(0.1) %	3.3 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	0.5 %	(33.3) %
Gold(INR/10g)	49,118	0.4 %	26.0 %
Gold Comex(USD/oz)	1,820	0.4 %	18.0 %
SILVER(INR/1Kg)	52,472	1.7 %	13.9 %
Aluminium(USD/MT)	1,621	0.2 %	(8.5) %
Copper(USD/MT)	6,417	(0.6) %	4.1 %

## 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:** China's one-year loan prime rate was retained at 3.85% and the five-year loan prime rate was maintained at 4.65%, as the economy showed signs of recovery from the unprecedented slump caused by the coronavirus pandemic. The bank was expected to retain its rates Monday as the medium lending facility rate was kept unchanged at 2.95 percent earlier this month. The euro area current account surplus dropped in May largely reflecting the widening deficit on the secondary income, data from the European Central Bank showed Monday. The current account surplus slipped to EUR 8 billion in May from EUR 14 billion in April. In the same period last year, the surplus was EUR 23 billion. Euro area trade surplus rose to EUR 17 billion from EUR 13 billion in April. Meanwhile, the surplus on services fell to EUR 4 billion from EUR 5 billion. According to survey data from IHS Markit, the UK headline household finance index, which measures households' overall perceptions of financial well-being, rose to 41.5 in July from 40.7 in June. UK house prices jumped in July, property website Rightmove said Monday. The asking prices increased 3.7% year-on-year to GBP 312,625 in July. This was the highest rate since December 2016. Prices gained 2.4% from March pre-lockdown period. Japan posted a merchandise trade deficit of 268.824 billion yen in June, the Ministry of Finance said on Monday, following the 833.4 billion yen deficit in May. Exports were down 26.2% on year to 4.862 trillion yen following the 28.3% drop in the previous month. Imports fell an annual 14.4% to 5.130 trillion yen after sinking 26.2% a month earlier.

**Global Equities:** US stocks stayed supported following positive results from trials of experimental COVID-19 vaccines by Oxford University and AstraZeneca (AZN) and Pfizer (PFE) and BioNTech (BNTX).

**Indian Economy:** In terms of back to business status, on an average, firms are operating between 28 to 63% of their capacities with workforce deployment ranging from 33 to 57%, according to the FICCI Survey on Indian Manufacturing Sector. FICCI Survey on Indian Manufacturing Sector assessed sentiments of manufacturers for Q-1 for 12 major sectors. Responses from 300 manufacturing units with a combined annual turnover of over INR 2.5 lakh crore. Increased borrowing by the government is likely to push up India's debt further to around Rs 170 trillion, or 87.6% of the gross domestic product (GDP) in the current financial year 2020-21 (FY21), suggests the latest edition of 'Ecowrap' report by State Bank of India (SBI). Fiscal estimates have gone awry across the globe amidst higher pandemic related expenditures, noted the latest SBI Ecowrap. Together with declining GDP growth, debt to ratio has also been adversely affected in all countries. India's debt to GDP ratio has increased gradually from Rs 58.8 lakh crore (67.4% of GDP) in FY12 to Rs 146.9 lakh crore (72.2% of GDP) in FY20.

**Equity Markets:** Key domestic barometers ended near the day's high on Monday, extending gains for the fourth straight session. The Nifty managed to close above the psychological 11,000 mark. Encouraging Q1 earnings from index pivotals countered the impact of the surge in domestic coronavirus cases.

**Corporate News:** Wipro received order from Compliance Quest for quality management solutions Amid the prolonged nationwide lockdown and subsequent state and city specific restrictions disrupting construction activities, cement demand to de-grow by 22%-25% in FY2021, said rating agency Icria in a statement on Monday. The Union government is considering a move to unlock about 500 mineral blocks through an open and transparent auction by repealing Section 10A2 (b) of MMDR Act under the 'AtmanirbharBharat' vision.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	106.8	(33.7)	52.5
MF(INR cr)	8.7	(235.1)	(69.5)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	63,804	59,401	54,014
F&O(INR cr)	1,187,373	1,809,416	1,473,382

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.5	28.1	33.3
NSE VIX	24.7	25.6	34.6

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,322	1.6 %	22.6 %	Energy	14,936	(0.0) %	38.7 %
IT	17,258	2.6 %	43.3 %	Pharma	10,305	(1.6) %	46.6 %
Metals	2,106	0.1 %	35.6 %	Finance	11,093	1.6 %	24.0 %
Auto	7,176	0.5 %	54.1 %	PSU	1,442	0.7 %	12.4 %
FMCG	31,536	0.3 %	19.6 %	Real Estate	197	0.4 %	14.6 %

### 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>
General In	162	10.0 %	53.6 %	Sun Pharma	484	(3.9) %	40.8 %
Britannia	3,983	5.2 %	55.3 %	Lupin	864	(3.7) %	49.3 %
Info Edg.(	3,255	4.7 %	61.6 %	SBI Life I	854	(2.4) %	34.5 %
Bajaj Fina	3,442	4.2 %	55.1 %	Cipla	674	(2.1) %	63.0 %
HCL Techno	649	4.1 %	56.8 %	Interglobe	971	(2.0) %	(2.8) %

### 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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