



22 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,162	0.0 %	35.2 %
BSE SENSEX	37,930	1.4 %	34.2 %
CNX BANK	22,782	0.0 %	25.1 %
CNX MIDCAP	15,402	0.0 %	34.3 %
CNX SMALLCAP	4,928	0.0 %	39.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,840	0.6 %	(6.0) %
S&P 500	3,257	0.2 %	0.8 %
FTSE 100	6,270	0.1 %	(17.6) %
HANG SENG	25,636	2.3 %	(10.2) %
NIKKEI	22,884	0.7 %	(1.4) %
SHANGHAI COMPOSITE	3,321	0.2 %	7.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.40	(0.5) %	4.5 %
EUR/USD	1.15	0.6 %	2.3 %
GBP/USD	1.27	1.2 %	(3.6) %
USD/JPY	107.07	(0.1) %	(1.5) %
USD/AUD	1.41	(1.3) %	(0.9) %
USD/SGD	1.39	(0.3) %	3.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	0.5 %	(33.3) %
Gold(INR/10g)	49,264	0.3 %	26.3 %
Gold Comex(USD/oz)	1,820	0.4 %	18.0 %
SILVER(INR/1Kg)	54,694	4.2 %	18.8 %
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: The European Union leaders reached a deal on a 1.8 trillion-euro coronavirus recovery fund today. To confront the biggest recession in its history, the EU will establish a 750 billion-euro coronavirus fund, partly based on common borrowing, to be sent as loans and grants to the hardest-hit countries. That comes on top of the seven-year, 1 trillion-euro EU budget that leaders had been haggling over for months even before the pandemic. UK budget deficit increased sharply in June, data from the Office for National Statistics showed Tuesday. Public sector net borrowing excluding public sector banks increased GBP 28.3 billion to GBP 35.5 billion, which was the third highest deficit in any month on records. Borrowing for May was revised down by GBP 9.8 billion to GBP 45.5 billion. Central government net cash requirement in June was GBP 47.1 billion, which was GBP 33.6 billion more than in June 2019 and the highest cash requirement in any June on record. Japan consumer prices were up 0.1% on year in June, the Ministry of Internal Affairs and Communications said on Tuesday, unchanged from the May reading. Core CPI, which excludes volatile food prices, was unchanged on an annual basis following the 0.2% decline in the previous month.

Global Equities: US President Donald Trump acknowledged a big flare up of COVID-19 cases, capping upmove in US stocks.

Indian Economy: The Federation of Automobile Dealers Associations (FADA) today released the Monthly Vehicle Registration Data for the Month of June 2020. June 2020. Vehicle Registration for June tumbled by 42% as the Indian economy continues to battle with Covid-19. On a YoY basis, 2-Wheeler registrations de-grew by 40.92%, 3-Wheeler by 75.43%, Commercial vehicles by 83.83%, and Passenger vehicles by -38.34%. Tractors registrations continue to march ahead with June numbers showing a growth of 10.86%. Overall Auto demand though continues to be a challenge coupled with supply side constraints as well Constraints in Retail Lending from NBFC's, normalcy in demand still seems quite distant and not before the festive season.

Equity Markets: Key equity benchmarks ended with strong gains on Tuesday, rising for the fifth straight session. Hopes for a coronavirus vaccine lifted world risk appetite. The first set of results from early-stage clinical trials of the Oxford University Covid-19 vaccine candidate show the vaccine is safe and induces an immune reaction.

Corporate News: Axis Bank has reported an 18.8% year-on-year decline in standalone profit for the June quarter, impacted by lower other income and higher provisions. Net interest income (NII) grew by 19.5% year-on-year to Rs 6,985.3 crore in the quarter, with a strong loan growth of 17% (including TLTRO investments) and deposits growth of 19 percent on quarterly average basis (QAB). Hindustan Copper posted a consolidated loss of Rs 514.27 crore for the March quarter. The company had posted a consolidated profit of Rs 40.37 crore in the year-ago period. The consolidated income of the company during January-March period of 2019-20 dropped to Rs 166.47 crore from Rs 475.09 crore in the year-ago period. Hindustan Unilever Ltd (HUL) today reported a 7% year-on-year increase in standalone net profit at Rs 1,881 crore for the June quarter. The company reported a net profit of Rs 1,775 in the same quarter last year. Revenue of the company increased 4% YoY to Rs 10,406 crore during the quarter.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	219.8	(15.6)	54.8
MF(INR cr)	(588.8)	(245.8)	(73.8)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	70,845	60,219	54,244
F&O(INR cr)	1,317,023	1,776,589	1,471,269

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.5	28.1	33.3
NSE VIX	24.4	25.6	34.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,782	2.1 %	25.1 %	Energy	15,457	3.5 %	43.5 %
IT	17,273	0.1 %	43.4 %	Pharma	10,154	(1.5) %	44.5 %
Metals	2,119	0.6 %	36.4 %	Finance	11,318	2.0 %	26.6 %
Auto	7,296	1.7 %	56.6 %	PSU	1,472	2.1 %	14.7 %
FMCG	31,280	(0.8) %	18.7 %	Real Estate	201	2.0 %	16.9 %

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>
Piramal En	1,558	10.8 %	66.4 %	Bajaj Fina	3,292	(4.3) %	48.4 %
Power Grid	174	6.2 %	12.3 %	Bajaj Fins	6,384	(3.6) %	41.8 %
B P C L	464	6.2 %	53.2 %	Havells In	579	(3.4) %	19.5 %
I O C L	93	5.8 %	18.4 %	Indraprast	405	(3.1) %	3.6 %
Eicher Mot	20,117	4.8 %	54.7 %	Aurobindo	800	(2.8) %	104.0 %

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					

..... End of Report