



22 Jul.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,531	(1.1) %	9.2 %
BSE SENSEX	80,605	(0.9) %	8.9 %
CNX BANK	52,266	(0.7) %	9.9 %
CNX MIDCAP	55,908	(2.1) %	14.3 %
CNX SMALLCAP	18,398	(2.3) %	16.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	4,028,753	(0.9) %	10,582.1 %
S&P 500	5,505	(0.7) %	16.1 %
FTSE 100	8,156	(0.6) %	5.6 %
HANG SENG	17,418	(2.0) %	3.7 %
NIKKEI	40,064	(0.2) %	20.4 %
SHANGHAI COMPOSITE	2,982	0.2 %	0.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.63	0.1 %	0.7 %
EUR/USD	1.09	(0.0) %	(1.1) %
GBP/USD	1.30	(0.2) %	2.0 %
USD/JPY	156.65	(0.2) %	11.0 %
USD/AUD	1.49	0.1 %	1.2 %
USD/SGD	1.34	0.0 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	80	(3.2) %	13.9 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,401	(1.2) %	15.5 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,312	(1.0) %	(1.0) %
Copper(USD/MT)	9,214	(1.4) %	9.3 %

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	0.1 %	0.4 %

Global Economy: China cut benchmark lending rates at a monthly fixing on Monday, after the central bank surprised the markets by lowering a key short-term policy rate. The one-year loan prime rate (LPR) was lowered by 10 basis points to 3.35% from 3.45% previously, while the five-year LPR was reduced by the same margin to 3.85% from 3.95%. Eurozone inflation expectations for this year and next year remained unchanged, the Survey of Professional Forecasters from the European Central Bank showed. Respondents' expectations for headline inflation were stable at 2.4 percent this year and 2.0 percent in 2025. Meanwhile, inflation expectation for 2026 was revised down to 1.9 percent from 2.0 percent. Longer-term inflation expectations came in at 2.0 percent. The euro area current account balance showed a surplus of EUR 37 billion in May, which was unchanged from the previous month, the European Central Bank reported. The visible trade surplus decreased to EUR 33 billion from EUR 37 billion, while the surplus on services trade increased to EUR 15 billion from EUR 11 billion. The UK public sector net borrowing decreased GBP 3.2 billion from the last year to GBP 14.5 billion in June, marking the lowest June borrowing since 2019, the Office for National Statistics said. The ONS said the interest payable on central government debt was GBP 7.4 billion, the lowest in any June since 2020. As a percentage to gross domestic product, public sector net debt came in at 99.5 percent at the end of June.

Global Indices: For the week, the major averages turned in a mixed performance. The tech-heavy Nasdaq plunged by 3.7 percent and the S&P 500 tumbled by 2.0 percent, but the Dow climbed by 0.7 percent.

Indian Economy: India's foreign exchange (forex) reserves jumped \$9.699 billion to an all-time high of \$666.854 billion for the week ended July 12, according to the latest RBI data. India's gold reserves increased by \$1.231 billion to \$58.663 billion during the week ended July 12. The special drawing rights (SDRs) were up by \$76 million to \$18.111 billion, the RBI said. Foreign currency assets increased by \$8.361 billion to \$585.47 billion. India's reserve position with the IMF was up by \$32 million to \$4.609 billion in the reporting week.

Equity Market: In the barometer index, the S&P BSE Sensex, was dropped 738.81 points or 0.91% to 80,604.65. The Nifty 50 index declined 269.95 points or 1.09% to 24,530.90.

Corporate News: HDFC Bank has reported a 35 per cent Y-o-Y growth in net profit at Rs 16,175 crore for the June quarter. NII increased by 26.4 per cent Y-o-Y to Rs 29,837 crore in Q1FY25, while net interest margin improved to 3.47 per cent in Q1FY25, compared to 3.44 per cent in Q4FY24. Reliance Industries Limited (RIL) reported a 5.5 per cent year-on-year (Y-o-Y) decline in consolidated profit to Rs 15,138 crore in Q1FY25. Revenue for the quarter stood at Rs 2.32 trillion, up 11.7 per cent Y-o-Y.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	604.1	269.0	35.5
MF(INR cr)	(1,899.1)	212.1	1,512.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	145,586	149,697	135,404
F&O(INR cr)	9,635,419	34,553,334	36,861,592

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.5	269.9	60.5
NSE VIX	14.8	13.9	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	52,266	(0.7) %	9.9 %	Energy	42,063	(2.7) %	6.5 %
IT	39,923	(0.2) %	13.9 %	Pharma	20,425	(1.7) %	6.3 %
Metals	9,256	(3.9) %	8.1 %	Finance	23,596	(0.8) %	11.3 %
Auto	24,963	(2.4) %	16.7 %	PSU	7,303	(1.4) %	2.7 %
FMCG	61,088	(0.2) %	13.4 %	Real Estate	1,096	(2.4) %	16.6 %

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>
Infosys	1,793	2.0 %	19.9 %	Samvardh.	192	(5.9) %	60.0 %
ITC	475	0.9 %	11.2 %	Tata Steel	158	(5.2) %	(3.3) %
Jio Financ	339	0.5 %	(5.1) %	Havells In	1,769	(5.1) %	16.8 %
Asian Pain	2,946	0.5 %	2.6 %	B P C L	304	(4.5) %	1.1 %
Berger Pai	524	0.5 %	(7.5) %	JSW Steel	889	(4.5) %	2.0 %

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					

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