



23 Jul.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,136	0.0 %	34.9 %
BSE SENSEX	37,872	(0.2) %	33.9 %
CNX BANK	22,883	0.0 %	25.7 %
CNX MIDCAP	15,423	0.0 %	34.5 %
CNX SMALLCAP	4,928	0.0 %	39.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,006	0.6 %	(5.4) %
S&P 500	3,276	0.6 %	1.4 %
FTSE 100	6,207	(1.0) %	(18.4) %
HANG SENG	25,058	(2.3) %	(12.2) %
NIKKEI	22,752	(0.6) %	(2.0) %
SHANGHAI COMPOSITE	3,333	0.4 %	8.0 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.37	(0.3) %	4.5 %
EUR/USD	1.16	1.0 %	3.1 %
GBP/USD	1.27	0.9 %	(3.6) %
USD/JPY	107.03	(0.2) %	(1.5) %
USD/AUD	1.40	(2.0) %	(1.8) %
USD/SGD	1.38	(0.4) %	2.9 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	42	2.8 %	(31.4) %
Gold(INR/10g)	50,005	1.5 %	28.2 %
Gold Comex(USD/oz)	1,860	2.1 %	20.5 %
SILVER(INR/1Kg)	59,295	8.4 %	28.7 %
Aluminium(USD/MT)	1,647	1.6 %	(7.1) %
Copper(USD/MT)	6,513	1.5 %	5.6 %

## 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 US National Association of Realtors stated that existing home sales surged by 20.7% to an annual rate of 4.72 million in June after plunging by 9.7% to a rate of 3.91 million in May. Tensions between the United States and China escalated further today after the US State Department confirmed it had ordered China to close its consulate in Houston, Texas, leading Beijing to insist on firm countermeasures unless Washington immediately reverses its decision. Japan manufacturing sector continued to contract in July, with a manufacturing PMI score of 42.6, the latest survey from Jibun Bank revealed on Wednesday. That's up from 40.1 in June, although it remains well beneath the boom-or-bust line of 50 that separates expansion from contraction. Individually, production and new orders continued to fall at substantial rates, albeit slower than in June. Australia's retail sales increased in June, preliminary data from the Australian Bureau of Statistics showed Wednesday. Retail turnover rose 2.4% on a monthly basis in June but slower than the 16.9% increase in May. Year-on-year, turnover spurt 8.2%. While some restrictions on trade remained in June, many businesses in these industries saw a full month of trade, having been closed for the first week of May, the ABS said.

**Global Equities:** The Dow added 0.6% to end just above 27000 mark in cautious trading.

**Indian Economy:** SEBI Chairman Ajay Tyagi highlighted the need to develop the corporate bond market across the rating curve and interlinking it with the government-security (g-sec) market. The corporate bond market in India is largely restricted to top rated bonds in India. Tyagi, speaking at FICCI's two-day 17th Annual Capital Market Conference stated that 97% of the bond trading happens in top rated corporate bonds -- AAA, AA-plus and AA. In the US, 75% of the corporate bond trading happens in the next three trading buckets -- A, BBB and BB.

**Equity Markets:** Domestic equity benchmarks ended with minor cuts after a volatile session. The barometer S&P BSE Sensex lost 58.81 points or 0.16% at 37,871.52. The Nifty 50 index shed 29.65 points or 0.27% at 11,132.60.

**Corporate News:** Larsen & Toubro (L&T) reported a 68.37% decline in consolidated net profit to Rs 536.88 crore in Q1 June 2020 from Rs 1697.62 crore in the same period last year. Profit was impacted mainly due to lower revenue, credit provisions in financial services business and under recovery of overheads. The company reported exceptional gain of Rs 224.72 crore in Q1 June 2020 on divestment of wealth management business. Shares of speciality chemical maker Rossari Biotech will debut on bourses tomorrow, 23 July 2020. Shares were issued at Rs 425 per share in public issue which was subscribed over 79 times. Rallis India reported 35.58% rise in consolidated net profit to Rs 91.87 crore on 6.85% rise in total income to Rs 674.45 crore in Q1 June 2020 over Q1 June 2019. Bajaj Holdings & Investment reported 1.47% rise in consolidated net profit to Rs 679.13 crore on 0.79% rise in total income to Rs 740.26 crore in Q1 June 2020 over Q1 June 2019.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	279.6	4.1	57.9
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)	69,430	60,833	54,449
F&O(INR cr)	1,998,782	1,790,476	1,478,303

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.8	27.9	33.2
NSE VIX	24.9	25.5	34.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,883	0.4 %	25.7 %	Energy	15,565	0.7 %	44.5 %
IT	17,076	(1.1) %	41.8 %	Pharma	10,175	0.2 %	44.8 %
Metals	2,114	(0.2) %	36.1 %	Finance	11,290	(0.2) %	26.3 %
Auto	7,204	(1.3) %	54.7 %	PSU	1,449	(1.6) %	12.9 %
FMCG	31,052	(0.7) %	17.8 %	Real Estate	199	(1.0) %	15.7 %

### 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>
Hindustan	197	7.9 %	22.9 %	Piramal En	1,490	(4.4) %	59.1 %
Axis Bank	479	7.3 %	33.5 %	Hero Motoc	2,768	(3.5) %	68.8 %
Muthoot Fi	1,316	6.9 %	117.6 %	SBI Life I	859	(3.3) %	35.3 %
Titan Comp	1,058	4.2 %	13.0 %	Tata Motor	105	(3.0) %	54.7 %
Power Grid	180	3.5 %	16.2 %	General In	154	(3.0) %	45.9 %

### 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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