



23 Jul.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,824	0.0 %	6.4 %
BSE SENSEX	52,837	1.2 %	5.6 %
CNX BANK	34,677	0.0 %	2.4 %
CNX MIDCAP	27,538	0.0 %	14.2 %
CNX SMALLCAP	10,455	0.0 %	26.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,823	0.1 %	13.8 %
S&P 500	4,367	0.2 %	16.3 %
FTSE 100	6,968	(0.4) %	6.0 %
HANG SENG	27,724	1.8 %	0.9 %
NIKKEI	27,548	0.6 %	1.1 %
SHANGHAI COMPOSITE	3,575	0.3 %	2.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.30	(0.3) %	1.8 %
EUR/USD	1.18	(0.2) %	(3.9) %
GBP/USD	1.37	(0.1) %	0.7 %
USD/JPY	110.18	0.1 %	6.8 %
USD/AUD	1.36	0.3 %	4.6 %
USD/SGD	1.36	0.3 %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	1.5 %	41.6 %
Gold(INR/10g)	47,471	(1.2) %	(6.9) %
Gold Comex(USD/oz)	1,804	(0.4) %	(7.4) %
SILVER(INR/1Kg)	66,857	(0.3) %	(2.9) %
Aluminium(USD/MT)	2,432	0.3 %	20.8 %
Copper(USD/MT)	9,272	0.7 %	17.1 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.1 %	0.4 %

**Global Economy:** The Conference Board released a report on Thursday showing its reading on leading US economic indicators increased by less than expected in the month of June. The report said the Conference Board's leading economic index climbed by 0.7% in June after advancing by a downwardly revised 1.2% in May. The US National Association of Realtors (NAR) released a report on Thursday showing existing home sales rebounded in the month of June following four straight monthly declines. NAR said existing home sales jumped by 1.4% to an annual rate of 5.86 million in June after slumping by 1.2% to a revised rate of 5.78 million in May. The European Central Bank (ECB) kept interest rates unchanged on Thursday. In a statement around lunchtime, the central bank said it would keep the Eurozone's refinancing rate at 0%, its marginal lending rate at -0.25%, and its deposit rate at -0.50%. The ECB governing council said it expects rates were set to stay where they are until it sees inflation reaching 2% well ahead of the end of its projection horizon and durably for the rest of the projection horizon. UK manufacturers' expectations about output growth over the coming three months hit a record high, the Industrial Trends Survey results from the Confederation of British Industry showed on Thursday. In the three months to July, output volumes grew at the joint-fastest pace on record, with the balance rising to 37%. A net 44 percent of manufacturers expect output growth to accelerate further next quarter, this was the strongest expectations on record. Australia's business conditions rose to a record high in the second quarter, while confidence eased slightly, survey data from the National Australia Bank showed on Thursday. The business conditions index rose strongly by 12 points to a record 32 points in the second quarter. Meanwhile, the business confidence index dropped to 17 from 19 in the preceding quarter.

**Global Equities:** The US stocks stayed largely supported as market continued to focus earnings.

**Indian Economy:** The Government of India (GoI) has announced the Sale (re-issue) of (i) 4.26% Government Security, 2023 for a notified amount of Rs 3,000 crore (nominal) through price based auction using uniform price method (ii) 6.10% Government Security, 2031 for a notified amount of Rs 14,000 crore (nominal) through price based auction using uniform price method; and (iii) 6.76% Government Security 2061 for a notified amount of Rs 9,000 crore (nominal) through price based auction using multiple price method.

**Equity Markets:** The equity benchmark indices ended with robust gains on Thursday. The Nifty managed to close above the crucial 15,800 mark. All sectoral indices on the NSE ended in the green. Bargain hunting emerged after the Sensex and the Nifty corrected over 1.8% in the past three sessions.

**Corporate News:** Hero MotoCorp has launched an advanced, 'connected', and feature-rich new Maestro Edge 125. Wipro launched FieldX, a cloud-based end-to-end digital service lifecycle automation solution built on ServiceNow's Now Platform. Tata Power has signed a share purchase agreement (SPA) with Tata Power International Pte., a wholly-owned subsidiary of the company, for sale of 100 percent equity shares held in Trust Energy Resources Pte, another wholly-owned subsidiary of the company for a consideration of USD 285.64 million.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(371.7)	(84.8)	(6.0)
MF(INR cr)	227.3	422.6	239.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	70,929	65,359	72,313
F&O(INR cr)	10,129,740	5,448,548	4,715,900

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.7	16.9	17.8
NSE VIX	11.9	12.5	17.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,677	0.8 %	2.4 %	Energy	19,600	1.5 %	5.9 %
IT	29,780	1.8 %	14.6 %	Pharma	14,575	0.7 %	17.8 %
Metals	5,349	3.0 %	27.7 %	Finance	16,499	1.3 %	3.7 %
Auto	10,236	0.1 %	2.1 %	PSU	2,410	0.9 %	8.8 %
FMCG	36,264	0.1 %	4.0 %	Real Estate	396	1.7 %	17.9 %

### 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>
Jubilant F	3,430	11.9 %	16.2 %	Hind. Unil	2,378	(2.3) %	(0.9) %
Gland Phar	4,147	9.3 %	68.0 %	SBI Cards	943	(2.3) %	(3.2) %
Tech Mahin	1,149	5.6 %	15.8 %	Asian Pain	3,107	(1.7) %	21.7 %
JSW Steel	717	5.1 %	40.8 %	Bajaj Auto	3,853	(1.3) %	2.9 %
ICICI Pru	635	5.1 %	43.0 %	Berger Pai	856	(1.1) %	12.0 %

### 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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