



23 Jul.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,509	(0.1) %	9.1 %
BSE SENSEX	80,502	(0.1) %	8.8 %
CNX BANK	52,280	0.0 %	9.9 %
CNX MIDCAP	56,625	1.3 %	15.8 %
CNX SMALLCAP	18,563	0.9 %	17.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	40,415	0.3 %	7.2 %
S&P 500	5,564	1.1 %	17.3 %
FTSE 100	8,199	0.5 %	6.2 %
HANG SENG	17,636	1.3 %	5.0 %
NIKKEI	39,599	(1.2) %	19.0 %
SHANGHAI COMPOSITE	2,964	(0.6) %	0.1 %

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: Bundesbank's latest monthly report indicates that while some factors are bolstering the German economy, they are simultaneously complicating efforts to bring inflation down to target. The labor markets are still operating at high capacity, wage growth is brisk, and prices are rising strongly, particularly in the service sector, the report stated. Bundesbank highlighted that inflationary risks also predominate on the supply side. Services inflation is expected to decline only modestly in the coming months, with the overall price index likely to fluctuate around current levels. Given these conditions, the Bundesbank advised that possible further interest rate cuts should therefore be carefully considered in light of current data. Producer prices in South Korea were down a seasonally adjusted 0.1 percent on month in June, the Bank of Korea said on Tuesday - following a 0.1 percent increase in May. On a yearly basis, producer prices climbed 2.5 percent - up from 2.4 percent in the previous month. Hong Kong's consumer price inflation rose for the second straight month in June to the highest level in three months, data released by the Census and Statistics Department showed on Monday. The consumer price index, or CPI, climbed 1.5 percent year-over-year in June, following a 1.2 percent rise in May.

Global Indices: The Nasdaq surged 280.63 points or 1.6 percent to 18,007.57, the S&P 500 jumped 59.41 points or 1.1 percent to 5,564.41 and the Dow rose 127.91 points or 0.3 percent to 40,415.44.

Indian Economy: The Economic Survey has projected a real GDP growth of 6.5%-7% for FY25. "The Survey conservatively projects a real GDP growth of 6.5%-7%, with risks evenly balanced, cognizant of the fact that the market expectations are on the higher side," said the Economic Survey 2023-24. The current account deficit for the year is around 0.7% of GDP. The current account registered a surplus in the last quarter of the financial year. The real GDP in FY24 was 20% higher than its level in FY20, a feat that only a very few major economies achieved, while also leaving a strong possibility for robust growth in FY25 and beyond.

Equity Market: The barometer index, the S&P BSE Sensex, was down 102.57 points or 0.13% to 80,502.08. The Nifty 50 index shed 21.65 points or 0.09% to 24,509.25.

Corporate News: Reliance Industries -arm, Reliance New Energy, has acquired the remaining 12.7-per cent stake in Reliance Lithium for 3.7 million Euros. Lemon Tree Hotels has signed two License Agreements viz. Lemon Tree Hotel, Arpora, Goa, and Keys Lite by Lemon Tree Hotels, Pathankot, Punjab. The two new properties are expected to open in FY2026.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	218.1	265.4	38.1
MF(INR cr)	(28.8)	194.9	1,491.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	131,440	148,480	135,352
F&O(INR cr)	29,990,926	34,249,173	36,771,188

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.5	269.9	60.5
NSE VIX	15.4	14.0	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	52,280	0.0 %	9.9 %	Energy	41,946	(0.3) %	6.2 %
IT	39,773	(0.4) %	13.5 %	Pharma	20,642	1.1 %	7.5 %
Metals	9,351	1.0 %	9.2 %	Finance	23,627	0.1 %	11.5 %
Auto	25,251	1.2 %	18.1 %	PSU	7,322	0.3 %	2.9 %
FMCG	60,882	(0.3) %	13.0 %	Real Estate	1,091	(0.5) %	16.1 %

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>
Hind.Aeron	4,997	4.1 %	46.8 %	Wipro	506	(9.2) %	4.3 %
REC Ltd	619	3.4 %	34.4 %	Kotak Mah.	1,758	(3.5) %	(1.9) %
Torrent Ph	3,030	2.8 %	13.2 %	Reliance I	3,001	(3.5) %	1.1 %
Bajaj Hold	9,979	2.7 %	18.7 %	ITC	467	(1.7) %	9.3 %
Siemens	7,023	2.5 %	28.6 %	Cholaman.I	1,403	(1.6) %	18.4 %

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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