



24 Jun.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,748	0.4 %	5.9 %
BSE SENSEX	52,306	(0.5) %	4.9 %
CNX BANK	34,574	0.0 %	2.1 %
CNX MIDCAP	26,676	0.0 %	10.6 %
CNX SMALLCAP	9,636	0.0 %	16.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,874	(0.2) %	10.7 %
S&P 500	4,242	(0.1) %	12.9 %
FTSE 100	7,074	(0.2) %	7.6 %
HANG SENG	28,817	1.8 %	4.9 %
NIKKEI	28,875	(0.0) %	5.9 %
SHANGHAI COMPOSITE	3,566	0.3 %	1.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.12	0.2 %	1.6 %
EUR/USD	1.19	0.4 %	(2.9) %
GBP/USD	1.39	0.8 %	1.9 %
USD/JPY	110.55	0.3 %	7.2 %
USD/AUD	1.33	(0.6) %	2.4 %
USD/SGD	1.35	(0.1) %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	(0.8) %	53.4 %
Gold(INR/10g)	47,021	(0.3) %	(7.8) %
Gold Comex(USD/oz)	1,764	(1.1) %	(9.5) %
SILVER(INR/1Kg)	67,958	(0.2) %	(1.3) %
Aluminium(USD/MT)	2,376	0.9 %	18.0 %
Copper(USD/MT)	9,191	1.6 %	16.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.0) %	0.6 %

Global Economy: The US new home sales tumbled by 5.9% to an annual rate of 769,000 in May after plunging by 7.8% to a downwardly revised rate of 817,000 in April, a report released by the Commerce Department on Wednesday showed. With the continued nosedive, new home sales fell to their lowest annual rate since hitting 704,000 in May of last year. Eurozone private sector grew at the fastest rate in 15 years in June, flash survey data from IHS Markit showed on Wednesday. Private sector improved as the economy re-opened further from virus-fighting restrictions and vaccine progress boosted confidence. At 59.2, the flash composite output index hit a 180-month high, up from 57.1 in May. The services Purchasing Managers' Index advanced to 58.0 in June from 55.2 in the previous month. The manufacturing PMI held steady at 63.1 in June, while it was forecast to fall to 62.1. UK composite output index dropped to 61.7 in June from 62.9 in May, data compiled by IHS Markit and the Chartered Institute of Procurement & Supply revealed on Wednesday. Private sector logged one of the fastest expansion on record in June as there were marked increases in output across the manufacturing and services sectors as the economy continued to reopen, following the COVID-19 lockdown. Japan manufacturing sector stays in expansion with a manufacturing PMI score of 51.5, the latest survey from Jibun Bank revealed on Wednesday. That's down from 53.0 in May, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. This was the weakest reading of the headline Index for four months. Australia manufacturing sector continued to expand in June with a manufacturing PMI score of 58.4, the latest survey from Markit Economics revealed on Wednesday. That's down from 60.4 in May.

Global Equities: The US stocks showed a lack of direction in last session though the tech-heavy Nasdaq inched up to a new record closing high.

Indian Economy: Union Health Ministry has alerted and advised Maharashtra, Kerala and Madhya Pradesh regarding the Delta Plus variant of COVID19 being found in some districts in these States. Reserve Bank of India (RBI) stated today that the preliminary estimate of household financial savings is placed at 8.2% of GDP in Q3:2020-21, exhibiting a sequential moderation for the second consecutive quarter after having spiked in the pandemic-hit first quarter of 2020-21. The moderation was driven by a significant weakening in the flow of household financial assets, which more than offset the moderation in the flow of household financial liabilities.

Equity Markets: Key indices reversed early gains and closed near the day's low with modest losses on Wednesday. Traders were jittery ahead of Thursday's monthly F&O expiry on the NSE. Barring the Nifty Auto index, all sectoral indices on the NSE ended in the red. The Nifty closed below the crucial 15,700 mark after hitting the day's high of 15,862.95 in initial deals.

Corporate News: Reliance Industries (RIL) will be in focus. RIL will conduct its 44th AGM virtually today, 24 June 2021, at 14:00 IST. The oil-to-telecom conglomerate may reportedly make announcements across its telecom, retail and O2C businesses. Shares of Shyam Metalics & Energy will debut on the bourses today, 24 June 2021. Shyam Metalics' IPO was subscribed over 121 times at a price band of Rs 303-306 apiece. Apollo Hospitals Enterprise on Wednesday announced the creation of India's largest omni-channel healthcare platform called 'Apollo HealthCo' by merging its online and offline pharmacies and telemedicine businesses through slump sale.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(91.7)	95.4	15.1
MF(INR cr)	(20.2)	(85.2)	110.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	76,967	79,864	75,862
F&O(INR cr)	5,270,239	4,667,981	4,547,214

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.9	17.5	18.3
NSE VIX	15.4	15.3	19.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,574	(0.5) %	2.1 %	Energy	20,354	(0.7) %	9.9 %
IT	28,259	(0.9) %	8.8 %	Pharma	14,018	(0.5) %	13.3 %
Metals	5,062	(1.1) %	20.8 %	Finance	16,430	(0.5) %	3.3 %
Auto	10,589	0.5 %	5.6 %	PSU	2,478	(0.0) %	11.9 %
FMCG	36,189	(0.3) %	3.8 %	Real Estate	348	(0.4) %	3.7 %

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>
Maruti Suz	7,433	2.3 %	7.3 %	SBI Cards	934	(4.3) %	(4.2) %
Punjab Nat	42	2.3 %	10.6 %	United Bre	1,404	(3.6) %	13.0 %
Bajaj Hold	3,600	1.6 %	7.8 %	NMDC	179	(3.6) %	29.1 %
Siemens	2,028	1.5 %	9.1 %	Adani Tran	1,321	(3.3) %	32.3 %
Titan Comp	1,783	1.5 %	14.3 %	Adani Port	719	(3.3) %	(2.4) %

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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