



24 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,215	0.0 %	35.9 %
BSE SENSEX	38,140	0.7 %	34.9 %
CNX BANK	23,084	0.0 %	26.8 %
CNX MIDCAP	15,572	0.0 %	35.7 %
CNX SMALLCAP	4,979	0.0 %	40.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,652	(1.3) %	(6.6) %
S&P 500	3,236	(1.2) %	0.2 %
FTSE 100	6,211	0.1 %	(18.3) %
HANG SENG	25,263	0.8 %	(11.5) %
NIKKEI	22,752	(0.6) %	(2.0) %
SHANGHAI COMPOSITE	3,325	(0.2) %	7.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.53	0.2 %	4.7 %
EUR/USD	1.16	1.0 %	3.3 %
GBP/USD	1.27	0.2 %	(3.5) %
USD/JPY	107.04	(0.0) %	(1.5) %
USD/AUD	1.40	(0.6) %	(1.6) %
USD/SGD	1.39	(0.2) %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	42	(0.1) %	(31.5) %
Gold(INR/10g)	50,619	1.2 %	29.8 %
Gold Comex(USD/oz)	1,867	0.4 %	21.0 %
SILVER(INR/1Kg)	60,675	2.3 %	31.7 %
Aluminium(USD/MT)	1,651	0.3 %	(6.8) %
Copper(USD/MT)	6,527	0.2 %	5.9 %

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 Labor Department reported that 1.4 million people filed for unemployment insurance for the week ended July 18, up 109,000 from the prior week. With this spurt, the number of Americans filing for unemployment rose for the first time in nearly five months. German consumer confidence is set to rise in August, survey data from market research group GfK showed Thursday. The forward-looking consumer sentiment index rose to -0.3 points from revised -9.4 in July. GfK said German consumers are gradually putting the coronavirus shock of earlier this year behind them. A V-shaped trend is emerging for the consumer climate. UK manufacturers expect output to begin recovery in months ahead for the first time since the Covid-19 crisis hit the economy, the quarterly Industrial Trends Survey from the Confederation of British Industry showed Thursday. A balance of manufacturers forecasting output to recover in the next quarter came in at +15 percent, the first increase since February 2020. Australia's business confidence dropped in the second quarter due to the weakness in construction and mining, quarterly survey data from the National Australia Bank showed Thursday. The survey showed a significant deterioration in both current conditions as well as expected outcomes for activity, capex and employment going forward.

Global Equities: US stocks pulled back on signs that the rapid spread of the virus threatens the economic recovery. Tech stocks continued to endure heavy correction.

Indian Economy: The Reserve Bank of India placed on its website the 'Report of the Committee for Analysis of QR (Quick Response) Code'. The Committee was constituted by RBI on December 23, 2019 under the Chairmanship of Prof. D.B. Phatak (Professor Emeritus, IIT-Bombay) to review the prevalent system of QR Codes in India for facilitating digital payments and submit recommendations. The Reserve Bank invites comments / suggestions on the report from all stakeholders and members of public which may be forwarded by email on / before August 10, 2020.

Equity Markets: Domestic equity benchmarks ended near the day's high on Thursday, supported by firmness in banks stocks. Trading was volatile due to weekly expiry of index options. The Sensex ended the day 269 points, or 0.71%, higher at 38,140.47 and the Nifty closed 83 points, or 0.74%, up at 11,215.45.

Corporate News: Cipla is set to launch Favipiravir, developed by the Council of Scientific and Industrial Research (CSIR) in a cost-effective process, for the treatment of COVID-19 patients. Can Fin Homes said its board approved raising up to Rs 1,000 crore via equity and Rs 4,000 crore via debt instruments. Bank of Maharashtra reported Q1 profit at Rs 101 crore versus Rs 81.1 crore, net interest income (NII) at Rs 1,087.9 crore versus Rs 996.8 crore YoY. Lupin received tentative nod from the US Food & Drug Administration for Empagliflozin and Linagliptin tablets, which are used to improve glycemic control in adults with Type 2 diabetes.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	232.9	18.4	60.2
MF(INR cr)	(0.6)	(247.5)	(78.7)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	59,976	60,779	54,523
F&O(INR cr)	3,471,636	1,889,368	1,504,531

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.3	27.7	33.0
NSE VIX	24.6	25.5	34.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,084	0.9 %	26.8 %	Energy	15,803	1.5 %	46.7 %
IT	17,045	(0.2) %	41.5 %	Pharma	10,322	1.4 %	46.9 %
Metals	2,131	0.8 %	37.2 %	Finance	11,380	0.8 %	27.3 %
Auto	7,301	1.3 %	56.8 %	PSU	1,467	1.2 %	14.3 %
FMCG	31,102	0.2 %	18.0 %	Real Estate	202	1.4 %	17.3 %

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>
Divi's Lab	2,397	6.0 %	27.7 %	Axis Bank	461	(3.8) %	28.5 %
Hindustan	207	5.1 %	29.3 %	Shree Ceme	21,568	(1.9) %	30.3 %
Eicher Mot	20,882	5.0 %	60.6 %	Godrej Con	682	(1.7) %	24.2 %
Abbott Ind	15,529	4.0 %	(0.5) %	Hind. Unil	2,211	(1.7) %	1.5 %
Havells In	606	3.6 %	25.0 %	Ambuja Cem	198	(1.5) %	26.4 %

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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