



24 Jul.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,479	(0.1) %	9.0 %
BSE SENSEX	80,429	(0.1) %	8.7 %
CNX BANK	51,778	(1.0) %	8.8 %
CNX MIDCAP	56,285	(0.6) %	15.1 %
CNX SMALLCAP	18,401	(0.9) %	16.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	40,358	(0.1) %	7.0 %
S&P 500	5,556	(0.2) %	17.1 %
FTSE 100	8,167	(0.4) %	5.8 %
HANG SENG	17,469	(0.9) %	4.1 %
NIKKEI	39,594	(0.0) %	18.9 %
SHANGHAI COMPOSITE	2,915	(1.7) %	(1.6) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.72	0.1 %	0.8 %
EUR/USD	1.09	(0.4) %	(1.4) %
GBP/USD	1.29	(0.5) %	1.4 %
USD/JPY	157.51	0.6 %	11.6 %
USD/AUD	1.50	0.6 %	1.8 %
USD/SGD	1.35	0.3 %	1.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	(2.2) %	11.4 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,398	(0.1) %	15.3 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,259	(2.3) %	(3.3) %
Copper(USD/MT)	9,128	(0.9) %	8.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.3	0.0 %	0.4 %

**Global Economy:** Euro area consumer confidence strengthened for a sixth month in a row in July as households look forward to, yet another interest rate cut from the European Central Bank in September. The flash consumer confidence index rose to -13.0 from -14.0 in June, survey data from the European Commission showed Tuesday. The consumer confidence index reading for the EU also increased in July, rising to -12.2 from -12.9 in June. The manufacturing sector in Japan slipped into contraction territory in July, the latest reading from Jibun Bank revealed on Wednesday with a manufacturing PMI score of 49.2. The survey also showed that the services PMI improved to 53.9 from 49.4 in June, and the composite index likewise improved to 52.6 from 49.7 a month earlier. The manufacturing sector in Australia continued to contract in July, albeit at a slower rate, the latest survey from Judo Bank revealed on Wednesday with a manufacturing PMI score of 47.4. The report also showed that the services PMI dipped to 50.8 from 51.2 in June. The composite index fell to 50.2 from 50.7 in June. Output growth waned in response to further demand weakness. Total new business decreased for the second month running in July, and at a slightly faster pace than in June. Meanwhile, new export orders decreased at the quickest pace in almost four years.

**Global Indices:** The Dow slipped 57.35 points or 0.1 percent to 40,358.09, the Nasdaq edged down 10.22 points or 0.1 percent to 17,997.35 and the S&P 500 dipped 8.67 points or 0.2 percent to 5,555.74.

**Indian Economy:** Sticking to the commitment of fiscal consolidation, India's Finance Minister Nirmala Sitharaman unveiled a budget that aims to provide impetus to job creation, start-ups and small enterprises, while proposals for raising the tax rates on capital gains damped market sentiment and send the rupee to a record low. The government lowered the fiscal deficit target to 4.9 percent of GDP for the financial year 2025 from 5.1 percent projected in the interim budget announced in February. The government aims to reduce the fiscal deficit below 4.5 percent of GDP by 2025-26.

**Equity Market:** The S&P BSE Sensex fell 73.04 points or 0.09% to 80,429.04. The Nifty 50 index shed 30.20 points or 0.12% to 24,479.05.

**Corporate News:** Hindustan Unilever reported a 2.2 per cent Y-o-Y rise in consolidated net profit at Rs 2,610 crore for Q1FY25. ICICI Prudential Life Insurance reported an 8.7 per cent yearly increase in net profit to Rs 225.4 crore in Q1FY25, owing to a rise in expenses (up 33 per cent Y-o-Y).



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	997.6	314.2	51.4
MF(INR cr)	(659.5)	149.9	1,483.3

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	181,792	150,562	135,955
F&O(INR cr)	53,660,956	35,462,410	36,990,536

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.9	252.9	59.9
NSE VIX	12.8	13.9	15.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	51,778	(1.0) %	8.8 %	Energy	41,720	(0.5) %	5.6 %
IT	40,045	0.7 %	14.3 %	Pharma	20,755	0.6 %	8.1 %
Metals	9,263	(0.9) %	8.2 %	Finance	23,304	(1.4) %	9.9 %
Auto	25,322	0.3 %	18.4 %	PSU	7,219	(1.4) %	1.5 %
FMCG	62,511	2.7 %	16.0 %	Real Estate	1,066	(2.3) %	13.4 %

### 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>
Titan Comp	3,467	6.5 %	(7.3) %	I R F C	194	(5.1) %	34.1 %
ITC	492	5.5 %	15.4 %	Power Fin.	524	(3.9) %	30.5 %
Tata Consu	1,257	4.3 %	15.6 %	REC Ltd	595	(3.8) %	29.2 %
Torrent Ph	3,139	3.6 %	17.3 %	Bharat Ele	301	(3.5) %	42.8 %
Godrej Con	1,517	3.2 %	23.5 %	Siemens	6,789	(3.3) %	24.3 %

### 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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