



25 Jun.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,790	0.7 %	6.2 %
BSE SENSEX	52,699	0.8 %	5.3 %
CNX BANK	34,827	0.7 %	2.9 %
CNX MIDCAP	26,601	(0.3) %	10.3 %
CNX SMALLCAP	9,639	0.0 %	16.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,197	1.0 %	11.7 %
S&P 500	4,266	0.6 %	13.6 %
FTSE 100	7,110	0.5 %	8.2 %
HANG SENG	28,882	0.2 %	5.1 %
NIKKEI	28,875	0.0 %	5.9 %
SHANGHAI COMPOSITE	3,567	0.0 %	1.8 %

FOREX RATES

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

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	0.8 %	54.7 %
Gold(INR/10g)	46,857	(0.3) %	(8.1) %
Gold Comex(USD/oz)	1,764	(1.1) %	(9.5) %
SILVER(INR/1Kg)	67,749	(0.3) %	(1.6) %
Aluminium(USD/MT)	2,354	(0.9) %	16.9 %
Copper(USD/MT)	9,043	(1.6) %	14.2 %

FIXED INCOME

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

Global Economy: The US Commerce Department released a report on Thursday showing the pace of US economic growth in the first quarter of 2021 was unrevised from the previous estimate. The report said real gross domestic product spiked by 6.4% in the first quarter, matching the estimate provided last month. The report US durable goods orders surged up by 2.3% in May after falling by a revised 0.8 percent in April. A report released by the Labor Department on Thursday showed a modest decrease in first-time claims for US unemployment benefits in the week ended June 19th. The Labor Department said initial jobless claims edged down to 411,000, a decrease of 7,000 from the previous week's revised level of 418,000. German business confidence edged up in June, reports said citing survey results from ifo Institute on Thursday. The business climate index rose to 101.8 in June from 99.2 in the previous month. According to ifo, both current assessment as well as expectations moved up in June. The current conditions index came in at 99.6 in June from May's initially estimated 95.7. The expectations index also rose to 104.0 in June. The Bank of England kept its key interest rate and quantitative easing unchanged. The nine-member Monetary Policy Committee headed by Andrew Bailey unanimously decided to hold the benchmark rate at a record low of 0.1%. The Reserve Bank Of Australia (RBA) remains committed to maintaining highly supportive monetary conditions. The aim of these policy settings is to support a return to full employment and inflation consistent with the target, the central bank noted in a latest update.

Global Equities: The US stocks saw firm moves. The Nasdaq and the S&P 500 hit new record intraday highs.

Indian Equities: The ministry of corporate affairs (MCA) has raised the threshold turnover and borrowing limits in its definition of small and medium companies (SMCs) to align the applicable accounting standards rules with the latest definition as per the ministry of micro, small & medium enterprises. According to a notification on Wednesday, SMCs have been defined as unlisted firms with a turnover not above Rs 250 crore and with no borrowings in excess of Rs 50 crore. A company shall qualify as a Small and Medium Sized Company, if the conditions mentioned therein are satisfied as at the end of the relevant accounting period.

Equity Markets: Benchmark indices ended a volatile session with decent gains on Thursday. The Nifty managed close near the 15,800 mark. IT, banks and financial shares were in demand while media and realty stocks declined. Positive global cues and declining COVID-19 cases boosted trading sentiment.

Corporate News: Reliance Industries, in its 44th AGM, offered many important updates. Saudi Aramco chairman Yasir Al-Rumayyan is joining Reliance board and the company showed confidence in concluding the Aramco deal in FY22. It also announced launch of affordable smartphone JioPhone and laid out plans to invest Rs 75,000 crore in new green energy business. Majesco will be in focus as promoter Aurum Platz IT Pvt Ltd acquired 14.31% stake in the company via off market transaction, taking total shareholding to 34.57% from 20.26% earlier. Indian Bank has raised Rs 1,650 crore via qualified institutional placement (QIP) and set issue price for QIP at Rs 142.15 per share.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(33.3)	87.8	14.2
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)	67,972	79,203	75,721
F&O(INR cr)	8,099,901	4,858,643	4,609,542

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.7	17.4	18.2
NSE VIX	15.1	15.3	19.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,827	0.7 %	2.9 %	Energy	20,079	(1.3) %	8.4 %
IT	29,048	2.8 %	11.8 %	Pharma	13,968	(0.4) %	12.9 %
Metals	5,091	0.6 %	21.5 %	Finance	16,520	0.5 %	3.8 %
Auto	10,618	0.3 %	5.9 %	PSU	2,443	(1.4) %	10.3 %
FMCG	36,243	0.1 %	3.9 %	Real Estate	346	(0.8) %	2.9 %

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>
SBI Cards	972	4.1 %	(0.3) %	Adani Tran	1,256	(5.0) %	25.7 %
Infosys	1,559	3.7 %	12.6 %	Reliance I	2,154	(2.4) %	6.5 %
TCS	3,374	3.4 %	6.6 %	Adani Gree	1,140	(2.3) %	(1.8) %
P & G Hygi	13,912	2.6 %	10.7 %	Jubilant F	3,163	(1.8) %	7.2 %
Tech Mahin	1,080	2.2 %	8.9 %	NMDC	176	(1.8) %	26.8 %

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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