



25 Jul.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,414	(0.3) %	8.7 %
BSE SENSEX	80,149	(0.3) %	8.3 %
CNX BANK	51,317	(0.9) %	7.9 %
CNX MIDCAP	56,873	1.0 %	16.3 %
CNX SMALLCAP	18,724	1.8 %	18.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	39,854	(1.3) %	5.7 %
S&P 500	5,427	(2.3) %	14.4 %
FTSE 100	8,154	(0.2) %	5.6 %
HANG SENG	17,311	(0.9) %	3.1 %
NIKKEI	39,155	(1.1) %	17.6 %
SHANGHAI COMPOSITE	2,902	(0.5) %	(2.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.67	(0.1) %	0.8 %
EUR/USD	1.09	0.1 %	(1.4) %
GBP/USD	1.29	0.1 %	1.5 %
USD/JPY	157.05	(0.3) %	11.3 %
USD/AUD	1.50	0.5 %	2.3 %
USD/SGD	1.35	0.0 %	1.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	77	(1.8) %	9.3 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,415	0.7 %	16.2 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,264	0.2 %	(3.1) %
Copper(USD/MT)	9,053	(0.8) %	7.4 %

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: The headline S&P Global Flash US PMI Composite Output Index rose from 54.8 in June to 55.0 in July, it's highest since April 2022. Output has now risen continually over the past one-and-a-half-years, with the pace of expansion having improved markedly in recent months after slowing in April. While the service sector expanded in July at the strongest rate since March 2022, manufacturing output fell into decline for the first time since January. The Flash US Services Business Activity Index came in at 56.0 in July whereas the Flash US Manufacturing Output Index was recorded at 49.5. The euro area private sector recovery waned further in July amid deteriorating manufacturing sector performance and softening services activity growth, a survey compiled by S&P Global showed on Wednesday. The HCOB composite output index dropped unexpectedly to 50.1 in July from 50.9 in June. The services Purchasing Managers' Index posted 51.9 in July, down from 52.8 a month ago. At 45.6, the manufacturing PMI slid to a seven-month low from 45.8 seen in June. Germany's private sector slipped into contraction in July due to the deeper decline in manufacturing and slower growth of services activity, flash survey results from S&P Global showed on Wednesday. The HCOB composite output index dropped unexpectedly to 48.7 in July from 50.4 in June. Services producer prices in Japan were up 3.0 percent on year in June, the Bank of Japan reported- accelerating from the upwardly revised 2.7 percent increase in May.

Global Indices: The Nasdaq plunged 654.94 points or 3.6 percent to 17,342.41, the S&P 500 dove 128.61 points or 2.3 percent to 5,427.13 and the Dow slumped 504.22 points or 1.3 percent to 39,853.87.

Indian Economy: The HSBC Flash India Composite Output Index, a seasonally adjusted measure of combined manufacturing and service sector output, climbed to 61.4 in July from 60.9 in June. This marks the strongest rate of expansion in three months, with both goods producers and service providers contributing to the upturn. The HSBC Flash India Manufacturing PMI rose to 58.5 in July (up from 58.3 in June), indicating a significant improvement in the sector's health. The HSBC Flash India Services PMI Business Activity Index also rose, reaching 61.1 in July compared to 60.5 in June. The survey results highlight increasing input costs for materials and labor, contributing to inflationary pressures. Notably, selling prices climbed to their highest level since February 2013.

Equity Market: The S&P BSE Sensex fell 280.16 points or 0.35% to 80,148.88. The Nifty 50 index shed 65.55 points or 0.27% 24,413.50.

Corporate News: Axis Bank reported a net profit of Rs 6,035 crore for the April-June quarter (Q1FY25). PAT was up just 4 per cent year-on-year, and down around 15 per cent quarter-on-quarter. Larsen & Toubro's consolidated net profit for the June quarter rose 12 per cent to Rs 2,786 crore. Its consolidated revenue increased 15 per cent to Rs 55,120 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(185.1)	283.0	48.2
MF(INR cr)	542.1	106.7	1,439.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	146,208	150,306	136,087
F&O(INR cr)	71,019,778	37,554,020	37,426,808

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.7	238.0	59.4
NSE VIX	11.8	13.8	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	51,317	(0.9) %	7.9 %	Energy	42,234	1.2 %	7.0 %
IT	40,115	0.2 %	14.5 %	Pharma	20,909	0.7 %	8.9 %
Metals	9,267	0.0 %	8.2 %	Finance	23,165	(0.6) %	9.3 %
Auto	25,309	(0.0) %	18.3 %	PSU	7,194	(0.4) %	1.1 %
FMCG	62,182	(0.5) %	15.4 %	Real Estate	1,074	0.8 %	14.3 %

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>
ICICI Pru	694	8.7 %	12.7 %	Godrej Con	1,459	(3.8) %	18.8 %
Life Insur	1,161	6.8 %	19.6 %	Dabur Indi	634	(2.8) %	19.8 %
HDFC Life	673	4.5 %	6.0 %	Bajaj Fins	1,579	(2.4) %	(4.1) %
Varun Beve	1,612	4.1 %	15.4 %	Bajaj Hold	9,502	(2.4) %	13.0 %
United Spi	1,383	3.8 %	19.4 %	Marico	658	(2.2) %	32.7 %

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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