



26 Jul.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,406	(0.0) %	8.7 %
BSE SENSEX	80,040	(0.1) %	8.1 %
CNX BANK	50,889	(0.8) %	7.0 %
CNX MIDCAP	56,742	(0.2) %	16.0 %
CNX SMALLCAP	18,673	(0.3) %	18.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	39,935	0.2 %	5.9 %
S&P 500	5,399	(0.5) %	13.8 %
FTSE 100	8,186	0.4 %	6.0 %
HANG SENG	17,005	(1.8) %	1.3 %
NIKKEI	37,870	(3.3) %	13.8 %
SHANGHAI COMPOSITE	2,887	(0.5) %	(2.6) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.68	0.0 %	0.8 %
EUR/USD	1.09	(0.2) %	(1.5) %
GBP/USD	1.29	(0.1) %	1.4 %
USD/JPY	156.10	(0.6) %	10.6 %
USD/AUD	1.51	0.5 %	2.8 %
USD/SGD	1.35	0.0 %	1.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	0.8 %	10.2 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,368	(1.9) %	13.9 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,266	0.1 %	(3.0) %
Copper(USD/MT)	9,019	(0.4) %	7.0 %

**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:** Economic growth in the U.S. accelerated by more than expected in the second quarter of 2024, according to a report released by the Commerce Department on Thursday. The report said real gross domestic product surged by 2.8 percent in the second quarter after jumping by 1.4 percent in the first quarter. On the inflation front, the report said the personal consumption expenditures price index increased 2.6 percent in the second quarter compared with an increase of 3.4 percent in the first quarter. Reflecting a steep drop in new orders for transportation equipment, the Commerce Department released a report that showed durable goods orders plunged by 6.6 percent in June after inching up 0.1 percent in May. Eurozone loan growth improved slightly in June but the overall pace of expansion remained subdued, data published by the European Central Bank showed. Adjusted loans to the private sector logged an annual growth of 1.1 percent after rising 0.8 percent in May. Further, data showed that the broad monetary aggregate M3 increased 2.2 percent on year. UK car output declined in the first six months of the year as manufacturers continue to shift their investment to make electrified models, the Society of Motor Manufacturers and Traders said Thursday. In the first six months of the year, car production declined 7.6 percent from the previous year. Factories turned out 416,074 units, down by 34,094 from the same period last year. During January to June, electrified vehicle production also dropped 7.6 percent annually.

**Global Indices:** Among the major averages, the Dow managed to settle higher, gaining 81.20 points or 0.20 percent at 39,935.07, a long way down from the day's high of 40,438.82. The S&P 500 ended at 5,399.22, losing 27.91 points or 0.51 percent.

**Indian Economy:** The Reserve Bank of India (RBI) has reported that currency in circulation contracted by 0.6% on the week to stand at Rs 35.54 lakh crore as on July 19, 2024. The central bank stated further that the overall reserve money edged up by 0.7% on the week to Rs 47.14 lakh crore. In the current fiscal, the currency in circulation has edged up by 1.8% so far while the reserve money has gained by 1.8%.

**Equity Market:** The barometer index, the S&P BSE Sensex, was down 109.98 points or 0.14% to 80,039.80. The Nifty 50 index shed 7.40 points or 0.03% to 24,406.10. The 50-unit index has fallen 1.59% in five straight sessions.

**Corporate News:** Tech Mahindra reported a 23 per cent Y-o-Y rise in its Q1FY25 net profit at Rs 851.5 crore. Consolidated revenue from operations was down 1 per cent Y-o-Y to Rs 13,005 crore in the April-June 2024 period. The company's EBIT margin came in at 8.5 per cent, which is an improvement of 110 bps Q-o-Q. Deal total contract value (TCV) stood at \$534 million. SJVN has received a letter of intent (LoI) for the allotment of the Darzo Lui pumped storage project from the Government of Mizoram. With an installed capacity of 2,400 MW, the estimated cost of the project upon completion is Rs 13,947.50 crore.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(419.1)	241.7	41.9
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)	139,110	149,684	136,125
F&O(INR cr)	45,020,194	37,968,807	37,522,927

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.0	225.1	58.8
NSE VIX	12.6	13.7	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	50,889	(0.8) %	7.0 %	Energy	42,770	1.3 %	8.3 %
IT	40,055	(0.1) %	14.3 %	Pharma	21,106	0.9 %	9.9 %
Metals	9,148	(1.3) %	6.8 %	Finance	23,050	(0.5) %	8.7 %
Auto	25,627	1.3 %	19.8 %	PSU	7,152	(0.6) %	0.5 %
FMCG	62,140	(0.1) %	15.3 %	Real Estate	1,065	(0.8) %	13.3 %

### 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>
Tata Motor	747	6.4 %	13.3 %	Axis Bank	1,176	(5.1) %	11.7 %
Tata Motor	1,091	6.2 %	9.9 %	I R F C	184	(4.5) %	26.8 %
Adani Gree	1,821	6.1 %	(3.6) %	Jindal Ste	938	(3.6) %	8.0 %
O N G C	336	5.1 %	24.4 %	Nestle Ind	2,481	(2.4) %	(4.1) %
I O C L	177	4.8 %	4.5 %	Titan Comp	3,406	(2.1) %	(8.9) %

### 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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