



27 Jul.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,194	(0.2) %	35.6 %
BSE SENSEX	38,129	(0.0) %	34.9 %
CNX BANK	22,662	(1.8) %	24.5 %
CNX MIDCAP	15,529	(0.3) %	35.4 %
CNX SMALLCAP	4,989	0.2 %	40.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,470	(0.7) %	(7.2) %
S&P 500	3,216	(0.6) %	(0.5) %
FTSE 100	6,124	(1.4) %	(19.5) %
HANG SENG	24,705	(2.2) %	(13.4) %
NIKKEI	22,752	(0.6) %	(2.0) %
SHANGHAI COMPOSITE	3,197	(3.9) %	3.6 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.58	0.1 %	4.7 %
EUR/USD	1.16	0.3 %	3.6 %
GBP/USD	1.28	0.3 %	(3.2) %
USD/JPY	106.21	(0.8) %	(2.2) %
USD/AUD	1.41	0.5 %	(1.1) %
USD/SGD	1.38	(0.0) %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	0.5 %	(32.5) %
Gold(INR/10g)	50,960	0.7 %	30.7 %
Gold Comex(USD/oz)	1,900	0.6 %	23.1 %
SILVER(INR/1Kg)	59,821	(1.4) %	29.9 %
Aluminium(USD/MT)	1,655	(0.4) %	(6.6) %
Copper(USD/MT)	6,413	(1.9) %	4.0 %

**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 Commerce Department said new home sales jumped by 13.8% to an annual rate of 776,000 in June after increasing by 19.4% to a revised rate of 682,000 in May. Germany's private sector recovered in July from the record contraction seen in April at the height of the lockdown measures related to the coronavirus outbreak, flash data from IHS Markit showed Friday. The composite output index jumped to 55.5 in July from 47.0 in June. A score above 50 indicates expansion. The flash services Purchasing Managers' Index also climbed to 56.7 from 47.3 in June. The flash manufacturing PMI came in at neutral 50.0 versus 45.2 in June. The UK private sector rose at the fastest pace in five years in July following the easing of lockdown measures to contain the spread of the coronavirus, flash survey data from IHS Markit showed Friday. The IHS Markit/Chartered Institute of Procurement & Supply composite output index rose to a 61-month high of 57.1 in July from 47.7 in June. UK consumer confidence index came in at -27 in July, unchanged from flash estimate but above from June's score of -30. Australia's private sector gained momentum, flash data from IHS Markit showed Friday. The flash Commonwealth Bank composite output index rose to 57.9 in July from 52.7 in June.

**Global Equities:** US stocks maintained their negative bias on Friday amid concerns about rising tensions between the US and China. DOW fell around 0.7%.

**Indian Economy:** The Reserve Bank of India or RBI released the 21st Issue of the Financial Stability Report (FSR). The RBI noted that in response to COVID-19, a combination of fiscal, monetary and regulatory interventions on an unprecedented scale has ensured normal functioning of financial markets. The overleveraged non-financial sector, simmering global geopolitical tensions, and economic losses on account of the pandemic are major downside risks to global economic prospects. The capital to risk-weighted assets ratio (CRAR) of Scheduled Commercial Banks (SCBs) edged down to 14.8% in March 2020 from 15% in September 2019 while their gross non-performing asset (GNPA) ratio declined to 8.5% from 9.3% and the provision coverage ratio (PCR) improved to 65.4% from 61.6 % over this period.

**Equity Markets:** Key domestic barometers ended near the flat line on Friday. The barometer index, the S&P BSE Sensex dropped 11.57 points or 0.03% at 38,128.90. The Nifty 50 index lost 21.30 points or 0.19% at 11,194.15. Sellers outnumbered buyers. On the BSE, 1065 shares rose and 1584 shares fell. A total of 147 shares were unchanged.

**Corporate News:** Reliance Industries said that Jio added 15.7 lakh users in April versus 46.9 lakh users in March. Ambuja Cement reported a 10.03% rise in its standalone net profit for the quarter ended June to Rs 453.37 crore. The company said its volumes were impacted during the second quarter of 2020 as a result of Covid-19 lockdown, and its cement sales volume declined by 29% during this quarter as compared to the same period of previous year. Agri and rural theme based counters would be in focus as kharif sowing has so far covered around 800 lakh hectares (lh) as on 24th July 2020, nearly 18.5% more area than 675 lh planted in the corresponding week last year. PNB Housing Finance NSE 5.00 % hopes to disburse around Rs 13,000 crore loan in current fiscal, and expects demand to pick up around October-November with the onset of festive season, media reports noted.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	282.9	34.0	63.2
MF(INR cr)	(467.0)	(337.2)	(101.0)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	67,022	61,146	54,688
F&O(INR cr)	1,153,542	1,848,489	1,499,973

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.8	27.5	32.9
NSE VIX	24.5	25.4	34.1

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,662	(1.8) %	24.5 %	Energy	15,896	0.6 %	47.6 %
IT	17,286	1.4 %	43.5 %	Pharma	10,238	(0.8) %	45.7 %
Metals	2,088	(2.1) %	34.4 %	Finance	11,185	(1.7) %	25.1 %
Auto	7,219	(1.1) %	55.0 %	PSU	1,438	(1.9) %	12.1 %
FMCG	31,019	(0.3) %	17.7 %	Real Estate	198	(1.7) %	15.3 %

### 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>
Reliance I	2,146	4.3 %	100.5 %	Zee Entert	152	(4.6) %	25.5 %
HCL Techno	680	4.2 %	64.4 %	Petronet L	241	(4.2) %	20.6 %
Tech Mahin	653	3.2 %	27.7 %	Hindalco I	156	(3.6) %	70.4 %
Marico	357	2.1 %	34.5 %	Biocon	415	(3.5) %	49.1 %
Sun Pharma	486	2.0 %	41.3 %	Hindustan	200	(3.5) %	24.8 %

### 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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