



27 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,824	0.0 %	6.4 %
BSE SENSEX	52,852	(0.2) %	5.6 %
CNX BANK	34,950	0.0 %	3.2 %
CNX MIDCAP	27,574	0.0 %	14.3 %
CNX SMALLCAP	10,435	0.0 %	26.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,144	0.2 %	14.8 %
S&P 500	4,422	0.2 %	17.7 %
FTSE 100	7,025	(0.0) %	6.9 %
HANG SENG	26,192	(4.1) %	(4.7) %
NIKKEI	27,833	1.0 %	2.1 %
SHANGHAI COMPOSITE	3,467	(2.3) %	(1.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.23	(0.1) %	1.7 %
EUR/USD	1.18	(0.1) %	(4.0) %
GBP/USD	1.37	0.0 %	0.7 %
USD/JPY	110.56	0.4 %	7.2 %
USD/AUD	1.36	0.2 %	4.7 %
USD/SGD	1.36	(0.0) %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	(0.2) %	51.0 %
Gold(INR/10g)	47,763	0.4 %	(6.4) %
Gold Comex(USD/oz)	1,804	(0.1) %	(7.5) %
SILVER(INR/1Kg)	67,461	0.6 %	(2.0) %
Aluminium(USD/MT)	2,500	0.3 %	24.1 %
Copper(USD/MT)	9,580	1.6 %	21.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.0 %	0.4 %

Global Economy: New home sales in the US saw another steep drop in the month of June, according to a report released by the Commerce Department on Monday. The report said new home sales tumbled by 6.6% to an annual rate of 676,000 in June after plunging by 7.8% to a revised rate of 724,000 in May. German business sentiment index fell to 100.8 in July from a revised 101.7 in June, reports said citing survey results from the IFO Institute on Monday. The current conditions index rose to 100.4 from revised 99.7 a month ago. Meanwhile, the business expectations index dropped notably to 101.2 in July from 103.7 in the prior month. Japanese manufacturers noted that demand for staff eased in July, with the rate of job creation the softest since April. Nonetheless, positive sentiment remained strong overall, despite easing slightly from June. The survey also showed that the services PMI fell to 46.4 from 47.2 in June, while the composite index slipped to 47.7 from 48.9.

Global Equities: The US equities hit record highs in choppy trade on Monday and the dollar weakened ahead of this week's Federal Reserve policy meeting.

Indian Economy: The Government of India (GOI) has announced the sale (re-issue) of four dated securities for a notified amount of Rs 32,000 crore. These include 5.63% GS 2026 (Rs 11000 crore), GoI FRB 2033 (Rs 4000 crore), 6.64% GS 2035 (Rs 10000 crore) and 6.67% GS 2050 (Rs 7000 crore). The auction will be conducted using uniform price method for 5.63% GS 2026, GoI FRB 2033 and 6.64% GS 2035 and multiple price method for 6.67% GS 2050. Both competitive and non-competitive bids for the auction should be submitted in electronic format on the Reserve Bank of India Core Banking Solution (E-Kuber) system on July 30, 2021.

Equity Markets: The domestic equity barometers ended a volatile session with modest losses on Monday. The Nifty failed to hold the 15,850 mark. While realty and auto stocks tumbled, metals, pharma and IT shares managed to end in the green.

Corporate News: Metal stocks will be in focus as COMEX Copper futures continued to surge. The latest floods in China are likely to cause supply bottlenecks. COMEX Copper futures have spiked to one and half month high of \$4.60 per pound with this spurt. Larsen & Toubro (L&T) reported 287% rise in consolidated profit after tax to Rs 1174 crore on a 38% increase in revenue to Rs 29335 crore in Q1 FY22 over Q1 FY21. The company bagged orders worth Rs 26,557 crore at the group level during the quarter ended June 30, 2021 registering a growth of 13% over corresponding period of the previous year. Tata Motors' consolidated net loss contracted to Rs 4,450.92 crore in Q1 June 2021 as compared to a net loss of Rs 8,437.99 crore in Q1 June 2020. Total revenue from operations soared 107.63% to Rs 66,406.45 crore in Q1 FY22 from Rs 31,983.06 crore in Q1 FY21. EBITDA margins improved by 570 bps to 8.3% in Q1 FY22 over Q1 FY21.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(28.9)	(39.8)	1.6
MF(INR cr)	227.3	422.6	239.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	66,793	65,910	72,254
F&O(INR cr)	3,604,114	5,226,754	4,686,346

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.2	17.0	17.8
NSE VIX	12.5	12.5	17.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,950	(0.2) %	3.2 %	Energy	19,300	(1.0) %	4.2 %
IT	29,940	0.2 %	15.2 %	Pharma	14,653	0.4 %	18.4 %
Metals	5,387	0.6 %	28.6 %	Finance	16,575	(0.2) %	4.2 %
Auto	10,138	(0.6) %	1.2 %	PSU	2,409	(0.8) %	8.8 %
FMCG	36,487	(0.2) %	4.6 %	Real Estate	397	(1.0) %	18.3 %

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>
SBI Cards	1,017	6.3 %	4.4 %	Adani Gree	942	(3.9) %	(18.8) %
Apollo Hos	4,100	4.6 %	41.7 %	United Spi	658	(3.8) %	17.8 %
SBI Life I	1,077	2.5 %	21.9 %	Adani Tran	940	(2.5) %	(6.0) %
Bajaj Fins	13,525	2.5 %	38.2 %	Bandhan Ba	298	(2.4) %	(15.1) %
Hindalco I	400	2.1 %	14.2 %	Biocon	390	(2.2) %	(5.1) %

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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