



28 Jun.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,860	0.4 %	6.7 %
BSE SENSEX	52,925	0.4 %	5.8 %
CNX BANK	35,365	1.5 %	4.4 %
CNX MIDCAP	26,895	1.1 %	11.5 %
CNX SMALLCAP	9,691	0.5 %	17.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,434	0.7 %	12.5 %
S&P 500	4,281	0.3 %	14.0 %
FTSE 100	7,136	0.4 %	8.6 %
HANG SENG	29,288	1.4 %	6.6 %
NIKKEI	29,066	0.7 %	6.6 %
SHANGHAI COMPOSITE	3,608	1.2 %	3.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.06	(0.1) %	1.5 %
EUR/USD	1.19	(0.0) %	(2.7) %
GBP/USD	1.39	(0.2) %	2.1 %
USD/JPY	110.89	0.0 %	7.5 %
USD/AUD	1.32	(0.2) %	1.7 %
USD/SGD	1.34	(0.1) %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	1.0 %	55.5 %
Gold(INR/10g)	46,991	0.3 %	(7.9) %
Gold Comex(USD/oz)	1,791	1.5 %	(8.1) %
SILVER(INR/1Kg)	68,388	0.9 %	(0.7) %
Aluminium(USD/MT)	2,451	2.2 %	21.7 %
Copper(USD/MT)	9,133	(2.7) %	15.3 %

FIXED INCOME

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

Global Economy: The Commerce Department said US personal income tanked by 2% in May after plunging by 13.1% in April. Disposable personal income, or personal income less personal current taxes, also slid by 2.3% in May after plummeting by 14.6% in April. The continued decrease in personal income in May primarily reflected a drop in government social benefits, as stimulus payments continued but at a lower level. Euro area money supply growth slowed more than expected in May, data from the European Central Bank revealed on Friday. The monetary aggregates M3 grew 8.4% year-on-year in May, slower than April's 9.2% increase. Similarly, the annual growth in the narrow measure M1, eased to 11.6% from 12.3% in the previous month. German forward-looking consumer sentiment index rose to -0.3 in July from revised -6.9 in June, as the country eases the lockdown restrictions, monthly survey results from GfK showed on Friday. The reading was the highest since August 2020. In June, the economic and income expectations increased significantly and the propensity to buy showed moderate growth. UK consumer confidence index held steady at -9.0 in June, while it was forecast to rise to -7.0, survey results from market research group GfK showed on Friday. Four measures of the index were up in comparison to the previous month, while one measure was down. The index measuring past changes in personal finances gained four points to zero. The forecast for personal finances over the next year rose only one point to +11.

Global Equities: The US stocks ended on a firm note on Friday as optimism about strong economic growth outweighed concerns about inflation. The major averages all closed higher, with the S&P 500 hitting a new record high in the session and recorded its biggest weekly gain since February 2021, rising 2.7%.

Indian Economy: The economic think-tank National Council of Applied Economic Research or NCAER said that it expects the Indian economy to grow 8.4-10.1% for the current financial year as against a contraction of 7.3% in the last fiscal. However, these high growth rates are also a reflection of strong base effect since 2021-22:Q1 follows the very steep decline in 2020-21:Q1. At the end of 2021-22 GDP, on constant prices, would still be about the same as Rs 146 trillion (Rs 146 lakh crore) as in 2019-20.

Equity Markets: Equity indices ended a lacklustre trading session with modest gains on Friday. The Nifty closed near the 15,850 level after opening at 15,839.35. Barring the Nifty FMCG index, all the sectoral indices on the NSE were positive.

Corporate News: Zuari Agro Chemicals will be in focus as the Competition Commission of India (CCI) has approved the acquisition of the Goa plant of the company by Paradeep Phosphates. Finolex Industries reported a higher consolidated profit at Rs 298.84 crore in Q4FY21 against Rs 58.66 crore in Q4FY20 while its revenue jumped to Rs 1,249.34 crore from Rs 768.66 crore YoY. India Glycols reported a higher consolidated profit at Rs 70.99 crore in Q4FY21 against Rs 17.91 crore in Q4FY20 while its revenue rose to Rs 1,604.14 crore from Rs 1,350.4 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(105.1)	77.1	12.0
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)	5,072	75,301	74,482
F&O(INR cr)	2,565,022	4,737,926	4,574,291

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.0	17.3	18.2
NSE VIX	13.4	15.2	19.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,365	1.5 %	4.4 %	Energy	19,961	(0.6) %	7.8 %
IT	29,211	0.6 %	12.4 %	Pharma	14,070	0.7 %	13.7 %
Metals	5,224	2.6 %	24.7 %	Finance	16,722	1.2 %	5.1 %
Auto	10,707	0.8 %	6.8 %	PSU	2,507	2.6 %	13.2 %
FMCG	36,007	(0.7) %	3.2 %	Real Estate	347	0.3 %	3.2 %

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>
Apollo Hos	3,439	7.4 %	18.8 %	Adani Tran	1,193	(5.0) %	19.4 %
Tata Steel	1,165	4.7 %	35.0 %	Reliance I	2,104	(2.3) %	4.1 %
Vedanta	262	4.5 %	13.4 %	Dabur Indi	564	(1.9) %	4.8 %
Info Edg.(4,954	3.5 %	16.2 %	Hind. Unil	2,449	(1.7) %	2.1 %
Axis Bank	761	3.0 %	6.8 %	NTPC	116	(1.7) %	7.6 %

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					

..... End of Report