



28 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,160	0.3 %	35.2 %
BSE SENSEX	37,935	(0.5) %	34.6 %
CNX BANK	21,849	0.0 %	20.0 %
CNX MIDCAP	15,324	0.0 %	33.6 %
CNX SMALLCAP	4,960	0.0 %	40.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,585	0.4 %	(6.8) %
S&P 500	3,239	0.7 %	0.3 %
FTSE 100	6,105	(0.3) %	(19.7) %
HANG SENG	24,603	(0.4) %	(13.8) %
NIKKEI	22,716	(0.2) %	(2.1) %
SHANGHAI COMPOSITE	3,205	0.3 %	3.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.53	0.0 %	4.7 %
EUR/USD	1.17	1.2 %	4.6 %
GBP/USD	1.29	1.0 %	(2.5) %
USD/JPY	105.45	(1.5) %	(2.9) %
USD/AUD	1.40	(0.1) %	(1.7) %
USD/SGD	1.38	(0.4) %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	42	0.8 %	(32.0) %
Gold(INR/10g)	52,260	2.6 %	34.0 %
Gold Comex(USD/oz)	1,975	3.9 %	28.0 %
SILVER(INR/1Kg)	64,063	7.1 %	39.1 %
Aluminium(USD/MT)	1,662	0.4 %	(6.2) %
Copper(USD/MT)	6,426	0.2 %	4.2 %

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 durable goods orders soared by 7.3% in June after skyrocketing by a downwardly revised 15.1% in May. The continued increase comes following the nosedive seen in March and April. Chinese industrial profits increased at a faster pace in June. Industrial profits grew 11.5% on a yearly basis in June following a 6% rise in May, as easing of the coronavirus containment measures boosted manufacturing activity. Eurozone money supply growth accelerated in June, while growth in private sector credit slowed marginally, data published by the European Central Bank showed Monday. The monetary aggregate M3 grew 9.2% on a yearly basis in June, faster than the 8.9% rise in May. German business confidence index rose to 90.5 in July from revised 86.3 in June, reports said citing survey data from IFO institute on Monday. The index measuring current situation came in at 84.5 in July. Japan's all industry activity dropped for the fourth month in a row in May. The all industry activity index fell 3.5% month-on-month in May, following a 7.6% fall in April, the Ministry of Economy, Trade and Industry revealed. Among components, construction activity declined 2.8% on month in May, after a 0.1% rise in April. The tertiary industry activity declined 2.2% in May, following a 7.7% fall. On a yearly basis, the all industry activity index tanked 17.4% in May, following a 13% decline in the prior month.

Global Equities: US stocks edged up with traders tracking positive developments on the Covid-19 vaccine front. Tech stocks surged with NASDAQ adding sharp gains.

Indian Economy: The Centre has released the last tranche of GST Compensation amounting over Rs 13,000 crore to States and Union Territories. With this, the total pay-out for the year stood at more than Rs 1.65 lakh crore which is almost 73% more than cess collection of nearly Rs 95,500 crore. To release the compensation for 2019-20, balance of cess amount collected during 2017-18 and 2018-19 was also utilised. In addition, the Centre had transferred Rs 33,412 crore from the Consolidated Fund of India to the Compensation Fund as a part of an exercise to apportion balance of IGST pertaining to 2017-18.

Equity Markets: Key benchmarks ended lower on Monday amid mixed global cues. The barometer index, the S&P BSE Sensex dropped 194.17 points or 0.51% at 37,934.73. The Nifty 50 index fell 62.35 points or 0.56% at 11,131.80.

Corporate News: Tech Mahindra's consolidated net profit increased by 20.9% sequentially to Rs 972.3 crore in June quarter. Consolidated revenue from operations fell 4% QoQ to Rs 9,106.3 crore and dollar revenue dropped 6.7% to \$1,207.5 million hit by COVID-19-led lockdown. NBCC India will be in focus as the company received orders worth Rs 204 crore. Kotak Mahindra Bank reported a decline of 8.5% in its standalone net profit at Rs 1,244 crore for June quarter. The gross non-performing assets ratio widened to 2.7% from 2.19% a year ago and 2.25% in the previous quarter. Percentage of net NPAs increased to 0.87% from 0.71% in March quarter and 0.73% a year ago.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	517.3	60.8	69.2
MF(INR cr)	(569.2)	(343.2)	(102.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	59,707	61,066	54,753
F&O(INR cr)	1,318,992	1,820,621	1,497,652

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.7	27.3	32.8
NSE VIX	25.0	25.4	34.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,849	(3.6) %	20.0 %	Energy	15,903	0.0 %	47.6 %
IT	17,627	2.0 %	46.3 %	Pharma	10,062	(1.7) %	43.2 %
Metals	2,094	0.3 %	34.8 %	Finance	10,909	(2.5) %	22.0 %
Auto	7,186	(0.4) %	54.3 %	PSU	1,394	(3.1) %	8.6 %
FMCG	30,820	(0.6) %	16.9 %	Real Estate	195	(1.7) %	13.4 %

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>
Muthoot Fi	1,363	4.6 %	125.4 %	ICICI Bank	359	(6.1) %	15.2 %
ICICI Pru	458	4.0 %	33.6 %	Interglobe	902	(4.8) %	(9.7) %
Asian Pain	1,778	3.9 %	10.9 %	Zee Entert	145	(4.2) %	20.3 %
Hindustan	207	3.3 %	28.9 %	Bank of Ba	47	(4.0) %	(9.0) %
HCL Techno	701	3.1 %	69.5 %	Aurobindo	779	(3.9) %	98.6 %

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					

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