



29 Jun.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,815	0.0 %	6.4 %
BSE SENSEX	52,736	(0.4) %	5.4 %
CNX BANK	35,359	0.0 %	4.4 %
CNX MIDCAP	27,037	0.0 %	12.1 %
CNX SMALLCAP	9,727	0.0 %	17.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,283	(0.4) %	12.0 %
S&P 500	4,291	0.2 %	14.2 %
FTSE 100	7,073	(0.9) %	7.6 %
HANG SENG	29,268	(0.1) %	6.5 %
NIKKEI	29,048	(0.1) %	6.6 %
SHANGHAI COMPOSITE	3,606	(0.0) %	3.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.05	(0.1) %	1.5 %
EUR/USD	1.19	0.0 %	(2.7) %
GBP/USD	1.39	(0.6) %	1.7 %
USD/JPY	110.81	(0.1) %	7.4 %
USD/AUD	1.32	(0.2) %	1.6 %
USD/SGD	1.34	(0.2) %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	(1.5) %	53.1 %
Gold(INR/10g)	46,903	(0.2) %	(8.1) %
Gold Comex(USD/oz)	1,779	(0.7) %	(8.7) %
SILVER(INR/1Kg)	68,152	(0.3) %	(1.0) %
Aluminium(USD/MT)	2,458	0.3 %	22.1 %
Copper(USD/MT)	9,334	(1.0) %	17.9 %

FIXED INCOME

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

Global Economy: Germany's import prices rose at the fastest pace since 1981, data published by Destatis revealed on Monday. Import prices recorded a double-digit annual growth of 11.8% in May, following a 10.3% gain in April. The latest increase in import prices was the fastest since October 1981, when prices climbed 13.6%. On month-on-month basis, the import price growth rose to 1.7% from 1.4% in April. Japan's inflation is likely to gain in the second half of 2021 as pent-up demand starts materializing, Bank of Japan (BOJ) policymakers said at the monetary policy meeting held on June 17 and 18. According to the summary of opinions, inflation is set to be around zero percent in the short run. Hong Kong's merchandise exports grew at a softer pace in May, data from the Census and Statistics Department showed on Monday. Exports rose 24% year-on-year in May, after a 24.4 percent increase in April. Imports gained 26.5% annually in May, following a 25.2% rise in the previous month. The trade deficit widened to HK\$25.464 billion in May from HK\$13.73 billion in the same month last year.

Global Equities: The US stocks saw a mixed outing as the be DOW eased a bit while the Nasdaq composite index hit a new record high.

Indian Economy: Union Finance Minister Nirmala Sitharaman has announced some new relief measures amid economic distress caused by the second wave of COVID-19 in the country. The FM announced loan guarantee scheme for Covid-affected sectors. A total of Rs 1.1 lakh crore of loan guarantee scheme for Covid-affected sectors has been announced. The FM announced a credit guarantee scheme through MFIs. The scheme is set to facilitate loans to 25 lakh people through micro finance institutions and will be provided to scheduled commercial banks for loans to new and existing NBFCs and MFIs for lending up to Rs 1.25 lakh. The interest rate on loans capped at MCLR plus 2%. The FM announced a credit guarantee scheme through MFIs. The scheme is set to facilitate loans to 25 lakh people through micro finance institutions and will be provided to scheduled commercial banks for loans to new and existing NBFCs and MFIs for lending up to Rs 1.25 lakh. The interest rate on loans capped at MCLR plus 2%.

Equity Markets: The key benchmark indices ended with modest losses on Monday. PSU Bank, pharma and metals stocks were in demand while IT stocks corrected. The Nifty hit a record high of 15,915.65 and the Sensex hit a record high of 53,126.73 in opening trade. Both these indices reversed gains as the session progressed and ended near their day's low.

Corporate News: HDFC Life Insurance Company will be in focus. Foreign promoter Standard Life will reportedly sell 3.46% stake in the company through block deal at a price band of Rs 658-678 per share. NALCO posted net turnover and net profit of Rs.8869.29 crore and Rs.1299.56 crore respectively in FY20-21 compared to Rs.8425.75 crore and Rs.138.23 crore achieved during the previous year. The net profit of the company for the financial year 2020-21 has jumped by 840% over last financial year. RITES said that Metro Express, Mauritius has awarded additional work of consultancy services (PMC) for extension of the mainline from Rose Hill to Reduit through Ebene for an additional fee of MUR 250 millions (Rs 45 crore approximately).



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(24.1)	71.8	11.3
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)	63,172	74,382	74,179
F&O(INR cr)	2,956,114	4,648,836	4,546,865

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.6	17.2	18.1
NSE VIX	13.4	15.1	18.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,359	(0.0) %	4.4 %	Energy	19,859	(0.5) %	7.2 %
IT	29,069	(0.5) %	11.9 %	Pharma	14,248	1.3 %	15.1 %
Metals	5,291	1.3 %	26.3 %	Finance	16,667	(0.3) %	4.8 %
Auto	10,710	0.0 %	6.9 %	PSU	2,567	2.4 %	15.9 %
FMCG	36,054	0.1 %	3.4 %	Real Estate	347	0.0 %	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>
Bandhan Ba	347	4.1 %	(1.2) %	HDFC Life	696	(4.1) %	0.8 %
Indraprast	534	4.1 %	1.3 %	Adani Gree	1,120	(4.1) %	(3.5) %
United Bre	1,430	3.5 %	15.1 %	Adani Tran	1,159	(2.8) %	16.0 %
ICICI Lomb	1,598	3.2 %	11.2 %	L & T Info	4,122	(2.2) %	0.2 %
Cadila Hea	643	3.0 %	45.4 %	P & G Hygi	13,605	(1.5) %	8.3 %

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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