



29 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,301	0.0 %	36.9 %
BSE SENSEX	38,493	1.5 %	36.3 %
CNX BANK	22,105	0.0 %	21.4 %
CNX MIDCAP	15,460	0.0 %	34.8 %
CNX SMALLCAP	5,027	0.0 %	42.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,379	(0.8) %	(7.6) %
S&P 500	3,218	(0.7) %	(0.4) %
FTSE 100	6,129	0.4 %	(19.4) %
HANG SENG	24,773	0.7 %	(13.2) %
NIKKEI	22,657	(0.3) %	(2.4) %
SHANGHAI COMPOSITE	3,228	0.7 %	4.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.60	0.0 %	4.8 %
EUR/USD	1.17	0.9 %	4.6 %
GBP/USD	1.29	1.1 %	(2.2) %
USD/JPY	105.27	(0.9) %	(3.1) %
USD/AUD	1.40	(0.8) %	(1.9) %
USD/SGD	1.38	(0.4) %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(1.3) %	(32.9) %
Gold(INR/10g)	52,278	0.0 %	34.1 %
Gold Comex(USD/oz)	1,959	(0.8) %	27.0 %
SILVER(INR/1Kg)	62,874	(1.9) %	36.5 %
Aluminium(USD/MT)	1,671	0.6 %	(5.7) %
Copper(USD/MT)	6,400	(0.4) %	3.8 %

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 Conference Board released a report on Tuesday showing that US consumer confidence deteriorated by more than expected in the month of July. The Conference Board said its consumer confidence index slumped to 92.6 in July after jumping to an upwardly revised 98.3 in June. Fitch Ratings maintained the sovereign ratings of China as the economy saw an impressive recovery from the downturn posed by the coronavirus pandemic. The rating agency retained the credit ratings at 'A+' with a 'stable' outlook, media reports noted. The German manufacturers' export expectations improved in July, survey data from the IFO institute showed Tuesday. The IFO export expectations index for manufacturing rose to plus 6.9 points in July from minus 2.2 points in June. Cautious optimism is spreading among German exporters on the economic recovery in many countries. Japan's services producer prices index grew 0.8% in June on a yearly basis, following May's 0.5% increase, data from the Bank of Japan showed Tuesday. Month-on-month, the services PPI climbed 0.2%, in contrast to a 0.6% drop in May.

Global Equities: US stocks saw cautious moves as lawmakers geared up for talks over a coronavirus aid plan. Traders also focusing on the upcoming Fed monetary policy meeting.

Indian Economy: The Confederation of Indian Industry (CII) has said that the government dues to industry have started coming in and this is likely to serve as a big and direct liquidity booster to industry. With the easing of restrictions and the economy entering an Unlock phase from June 1, the high frequency indicators which are coming in have been showing a material improvement as compared to the multi-year lows seen in April.

Equity Markets: Key benchmarks ended with robust gains on Tuesday amid broad-based buying support. Auto shares and IT shares were in demand. The barometer index, the S&P BSE Sensex rallied 558.22 points or 1.47% at 38,492.95. The Nifty 50 index added 168.75 points or 1.52% at 11,300.55.

Corporate News: IndusInd Bank registered a 67.8% (year-on-year) decline in Q1FY21 net profit on the back of a five-fold increase in provisions for bad loans. Standalone profit during the quarter declined to Rs 460.64 crore. Net interest income grew by 16.4% year-on-year to Rs 3,309.2 crore. Bank of Baroda on Tuesday said it has raised Rs 981 crore by issuing additional tier-1 bonds under Basel III norms. Bharti Airtel, Maruti Suzuki India, Dr Reddy's Laboratories, TVS Motor Company, InterGlobe Aviation will be in focus ahead of latest earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	5.3	57.9	68.3
MF(INR cr)	(332.8)	(357.2)	(111.9)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	63,493	61,194	54,865
F&O(INR cr)	1,755,818	1,817,381	1,500,920

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.4	27.2	32.7
NSE VIX	23.6	25.3	33.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,105	1.2 %	21.4 %	Energy	16,002	0.6 %	48.6 %
IT	18,043	2.4 %	49.8 %	Pharma	10,128	0.7 %	44.1 %
Metals	2,141	2.2 %	37.8 %	Finance	11,057	1.4 %	23.6 %
Auto	7,417	3.2 %	59.2 %	PSU	1,398	0.3 %	9.0 %
FMCG	30,911	0.3 %	17.3 %	Real Estate	198	1.6 %	15.2 %

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>
UltraTech	4,136	7.2 %	31.7 %	Havells In	576	(3.2) %	18.8 %
Adani Tran	236	4.8 %	24.6 %	Muthoot Fi	1,334	(2.1) %	120.8 %
Tata Motor	106	4.7 %	56.7 %	Bharti Inf	191	(1.9) %	22.8 %
TCS	2,310	4.7 %	35.2 %	ICICI Bank	352	(1.8) %	13.2 %
Kotak Mah.	1,384	4.6 %	17.1 %	Berger Pai	522	(1.7) %	8.0 %

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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