



30 Jun.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,748	(0.4) %	5.9 %
BSE SENSEX	52,550	(0.4) %	5.0 %
CNX BANK	35,010	(1.0) %	3.4 %
CNX MIDCAP	26,901	(0.5) %	11.5 %
CNX SMALLCAP	9,713	(0.1) %	17.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,292	0.0 %	12.0 %
S&P 500	4,292	0.0 %	14.3 %
FTSE 100	7,088	0.2 %	7.8 %
HANG SENG	28,994	(0.9) %	5.5 %
NIKKEI	28,813	(0.8) %	5.7 %
SHANGHAI COMPOSITE	3,573	(0.9) %	2.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.05	(0.0) %	1.5 %
EUR/USD	1.19	0.0 %	(2.7) %
GBP/USD	1.39	(0.4) %	1.7 %
USD/JPY	110.81	(0.1) %	7.4 %
USD/AUD	1.32	(0.1) %	1.6 %
USD/SGD	1.34	(0.1) %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	(1.5) %	53.1 %
Gold(INR/10g)	46,782	(0.3) %	(8.3) %
Gold Comex(USD/oz)	1,779	(0.7) %	(8.7) %
SILVER(INR/1Kg)	67,940	(0.3) %	(1.3) %
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: China's GDP growth is projected to hit 8.5% on a yearly basis in 2021, thanks to the pent-up demand and strong exports, according to the World Bank, which updated the economic forecasts in its regional economic report today. The latest estimate marked an upward revision by 0.6 percentage points from the World Bank's projections in December 2020, largely due to stronger-than-expected foreign demand. The World Bank estimates that China's year-on-year GDP growth may moderate to 5.4% in 2022, when the low base effects dissipate. The forecast figures remained unchanged from that in the bank's report of "Global Economic Prospects" issued earlier in the month. Eurozone economic confidence hit a 21-year high in June largely driven by the improvement in the services sector after the easing of lockdown restrictions, survey results from the European Commission showed on Tuesday. The economic confidence index moved up to 117.9 in June from 114.5 in the previous month. UK house prices grew 13.4% on a yearly basis in June, the biggest outturn since November, 2004, largely due to the low base of comparison, data from the Nationwide Building Society showed on Tuesday. Month-on-month, house price growth eased to 0.7% in June from 1.7% in May. Japan retail sales rose by 8.2% year-on-year in May, after an 11.9% rise a month earlier. This was the third straight month of increase in retail trade, as consumption recovered further in the wake of COVID-19 disruption. On a monthly basis, retail sales fell by 0.4% in May, after falling a revised 4.6% in April.

Global Equities: The S&P 500 and the Nasdaq both scaled fresh all-time highs though the overall sentiments remained choppy amid lack of major economic cues.

Indian Economy: Credit growth to the industrial sector remained in the negative territory during 2020-21, mainly due to the COVID-19 pandemic and resultant lockdowns, RBI data showed on Tuesday. However, personal loans continued to grow at robust pace and recorded 13.5% growth (Y-oY) in March 2021, noted the central bank. Government has reduced customs duty on crude palm oil from 35.75% to 30.25% and refined palm oil from 49.5% to 41.25%. This will bring down the retail prices of edible oils in the market, the CBIC noted.

Equity Markets: The key equity indices ended with modest losses on Tuesday. The Nifty closed a tad below 15,750 mark. Metals, banks, and auto stocks tumbled. The Nifty FMCG index outperformed the other sectoral indices on the NSE.

Corporate News: Reliance Industries has signed a pact to invest an undisclosed amount in a giant petrochemical hub being built in the UAE. HUDCO reported higher consolidated profit at Rs 526.28 crore in Q4FY21 against Rs 440.91 crore in Q4FY20 while its revenue fell to Rs 1,759.38 crore from Rs 1,888.49 crore YoY. Uflex will double aseptic packaging capacity to 7 billion packs per annum by March 2022 and will invest Rs 120 crore for the proposed expansion.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(158.7)	60.3	8.3
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)	76,623	74,489	74,220
F&O(INR cr)	3,464,779	4,592,452	4,528,830

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.6	17.2	18.1
NSE VIX	13.0	15.0	18.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,010	(1.0) %	3.4 %	Energy	19,849	(0.0) %	7.2 %
IT	28,986	(0.3) %	11.6 %	Pharma	14,330	0.6 %	15.8 %
Metals	5,226	(1.2) %	24.8 %	Finance	16,546	(0.7) %	4.0 %
Auto	10,612	(0.9) %	5.9 %	PSU	2,529	(1.5) %	14.2 %
FMCG	36,235	0.5 %	3.9 %	Real Estate	345	(0.4) %	2.9 %

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>
Marico	538	5.5 %	32.0 %	Adani Tran	1,115	(3.8) %	11.6 %
Gland Phar	3,398	4.5 %	37.7 %	P & G Hygi	13,169	(3.2) %	4.8 %
Apollo Hos	3,591	4.0 %	24.1 %	Bandhan Ba	336	(3.1) %	(4.3) %
Indraprast	550	3.1 %	4.5 %	IOCL	108	(2.4) %	16.1 %
Alkem Lab	3,196	2.1 %	15.1 %	ONGC	119	(2.4) %	14.4 %

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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