



30 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,203	0.0 %	35.7 %
BSE SENSEX	38,071	(1.1) %	34.7 %
CNX BANK	22,077	0.0 %	21.2 %
CNX MIDCAP	15,535	0.0 %	35.4 %
CNX SMALLCAP	5,023	0.0 %	41.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,540	0.6 %	(7.0) %
S&P 500	3,258	1.2 %	0.9 %
FTSE 100	6,131	0.0 %	(19.4) %
HANG SENG	24,883	0.5 %	(12.8) %
NIKKEI	22,397	(1.2) %	(3.5) %
SHANGHAI COMPOSITE	3,295	2.1 %	6.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.59	0.1 %	4.8 %
EUR/USD	1.18	0.2 %	4.8 %
GBP/USD	1.30	0.8 %	(1.7) %
USD/JPY	105.01	(0.4) %	(3.4) %
USD/AUD	1.39	(0.5) %	(2.3) %
USD/SGD	1.38	(0.3) %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	0.6 %	(32.5) %
Gold(INR/10g)	52,853	1.1 %	35.5 %
Gold Comex(USD/oz)	1,959	(0.8) %	27.0 %
SILVER(INR/1Kg)	64,155	2.0 %	39.3 %
Aluminium(USD/MT)	1,687	1.0 %	(4.8) %
Copper(USD/MT)	6,475	1.2 %	5.0 %

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) %	(1.4) %

Global Economy: The US Federal Reserve left interest rates near zero on Wednesday and pledged to keep supporting the United States economy as the pandemic continues to depress economic growth. The path of the economy will depend significantly on the course of the virus, the central bank said. German import prices declined at the slowest pace in four months in June, data from Destatis revealed Wednesday. Import prices declined 5.1% year-on-year in June, following May's 7% decrease. This was the slowest fall since February, when prices were down 2 percent. The annual fall was largely driven by a 37.2% decline in energy prices. The number of mortgages approved in UK rose to a three-month high of 40,000 in June from a record low 9,300 in May, as the housing market reopened after the relaxation of restrictions to curb the spread of the coronavirus, data from the Bank of England showed. Fitch Ratings downgraded Japan's sovereign rating outlook citing the sharp economic contraction caused by the coronavirus pandemic. The outlook on 'A' rating was lowered to 'negative' from 'stable'. The agency observed that a downturn in consumer spending and business investment has been exacerbated by a steep decline in exports associated with weak external demand. Japanese economy is forecast to contract 5% in 2020, before rebounding to 3.2% growth in 2021 due partly to the low base effect. However, the economy would not recover to its pre-pandemic level until the fourth quarter of 2021, Fitch said.

Global Equities: US stocks added good gains as the Federal Reserve left interest rates unchanged and Chairman Jerome Powell declared the central bank was not even thinking about raising rates.

Indian Economy: 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. A clutch of indicators including GST collections, railway freight traffic, petrol consumption, peak power demand, electronic toll collections among others have all mirrored the incipient signs of recovery. Though still early, these are indeed promising signs, pointing towards a V-shaped recovery in the immediate aftermath of the lockdown. Extensive and detailed logistical planning has been initiated by Food Corporation of India (FCI) to ensure that food grain stocks reach every part of the country as per the allocation over last few months.

Equity Markets: Key barometer indices ended with steep losses on Wednesday, dragged by correction in index heavyweight Reliance Industries. Profit selling in auto and IT stocks negated strength in pharma stocks. The barometer index, the S&P BSE Sensex dropped 421.82 points or 1.10% at 38,071.13. The Nifty 50 index lost 97.70 points or 0.86% at 11,202.85.

Corporate News: Mahindra & Mahindra (M&M) on Wednesday introduced new affordable finance schemes for its customers for all its vehicles, which includes EMI starting as low as Rs 899 per lakh for personal utility vehicles (UVs). Bharti Airtel said that its Q1 loss widened to Rs 15,933 crore on provision for adjusted gross revenue (AGR) while the revenue rose nearly 1%. NTPC on Wednesday said it achieved its highest-ever daily gross generation of 977.07 million units (MU) on July 28, 2020.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	24.5	56.2	67.8
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)	66,113	61,440	55,007
F&O(INR cr)	2,262,937	1,838,598	1,510,445

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.1	27.1	32.6
NSE VIX	24.1	25.3	33.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,077	(0.1) %	21.2 %	Energy	15,738	(1.7) %	46.1 %
IT	17,881	(0.9) %	48.4 %	Pharma	10,441	3.1 %	48.6 %
Metals	2,161	0.9 %	39.1 %	Finance	10,990	(0.6) %	22.9 %
Auto	7,330	(1.2) %	57.4 %	PSU	1,419	1.5 %	10.6 %
FMCG	30,949	0.1 %	17.4 %	Real Estate	198	0.0 %	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>
Dr Reddy's	4,302	6.2 %	39.0 %	Reliance I	2,097	(3.7) %	95.9 %
IndusInd B	551	4.5 %	60.8 %	Piramal En	1,424	(3.1) %	52.0 %
Tata Steel	374	4.3 %	40.3 %	Nestle Ind	16,598	(2.9) %	6.0 %
Shriram Tr	725	4.2 %	19.2 %	HCL Techno	694	(2.5) %	67.9 %
Colgate-Pa	1,448	4.0 %	16.5 %	M & M	605	(2.5) %	121.7 %

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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