



30 Jul.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,778	0.4 %	6.1 %
BSE SENSEX	52,653	0.4 %	5.2 %
CNX BANK	34,692	0.5 %	2.5 %
CNX MIDCAP	27,512	0.7 %	14.1 %
CNX SMALLCAP	10,476	0.9 %	26.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,085	0.4 %	14.6 %
S&P 500	4,419	0.4 %	17.7 %
FTSE 100	7,078	0.9 %	7.7 %
HANG SENG	26,315	3.3 %	(4.2) %
NIKKEI	27,782	0.7 %	1.9 %
SHANGHAI COMPOSITE	3,412	1.5 %	(2.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.31	0.1 %	1.9 %
EUR/USD	1.18	0.1 %	(3.7) %
GBP/USD	1.38	0.4 %	1.4 %
USD/JPY	109.98	(0.3) %	6.6 %
USD/AUD	1.36	0.0 %	4.7 %
USD/SGD	1.36	0.0 %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	1.0 %	52.0 %
Gold(INR/10g)	48,149	1.1 %	(5.6) %
Gold Comex(USD/oz)	1,822	0.8 %	(6.6) %
SILVER(INR/1Kg)	67,971	2.4 %	(1.3) %
Aluminium(USD/MT)	2,516	0.7 %	25.0 %
Copper(USD/MT)	9,697	(0.1) %	22.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.2	0.0 %	0.3 %

Global Economy: The US Commerce Department said real GDP surged up by 6.5% in the second quarter following a 6.3% rise in the first quarter. The US National Association of Realtors said its pending home sales index tumbled by 1.9% to 112.8 in June after soaring by 8.3% to a revised 115.0 in May. The US initial jobless claims dipped to 400,000, a decrease of 24,000 from the previous week's revised level of 424,000. Eurozone economic confidence hit a record high in July driven by rising sentiment in the industrial and service sectors, survey results from the European Commission showed on Thursday. The economic confidence index rose to 119.0 from 117.9 in June. This was the highest since records began in 1985. Germany's unemployment rate remained unchanged in June, Destatis reported Thursday. The jobless rate remained unchanged at adjusted 3.7% in June, the labor force survey showed. On an unadjusted basis, the unemployment rate rose slightly to 3.7% from 3.6% a month ago. The UK car output increased in June from the Covid-depressed June 2020, though it was the worst June total since 1953 as the global chip shortage continued to take a toll on production, the Society of Motor Manufacturers and Traders, or SMMT, said Thursday. In June, car production totaled 69,097 units, up 22.1% from the same period last year. The UK factories produced 498,923 cars in first half of year, down 38.4% on five-year average.

Global Equities: The Dow hit a fresh record highs on strong corporate earnings and a pickup in US economic growth.

Indian Economy: Indian Gold bar and coin investment in Q2 of 2021 increased 7% y-o-y, largely due to the low Q2 2020 base. But after surging in Q1, demand saw a q-o-q decline of 44% to 21t, taking the H1 total to 58.6t. Although that is 23% higher than H1 2020, it is low in historical terms - 25% below H1 2019 and 20% below the H1 average from 2015-2019.

Equity Markets: The domestic equity benchmarks ended with decent gains after a volatile session on Thursday. The Nifty, however, closed below the 15,800 mark. The bourses witnessed bouts of volatility on account of monthly F&O contracts expiry on the NSE today. While metal, PSU banks, realty and IT stocks edged higher, FMCG, pharma and auto shares edged lower.

Corporate News: Tech Mahindra reported a sharp increase in profit at Rs 1,353.2 crore in Q1FY22 against Rs 1,081.4 crore in Q4FY21. Its revenue rose to Rs 10,197.6 crore from Rs 9,729.9 crore QoQ. Container Corporation of India reported profit at Rs 258.4 crore for Q1FY22 against Rs 58.3 crore in Q1FY21. Its revenue jumped to Rs 1,819.9 crore from Rs 1,194.2 crore YoY. Ajanta Pharma reported higher profit at Rs 173.7 crore in Q1FY22 against Rs 147.8 crore in Q1FY21. Its revenue rose to Rs 748 crore from Rs 668.2 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(328.2)	(70.4)	(7.5)
MF(INR cr)	638.9	732.5	325.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	79,767	67,450	72,402
F&O(INR cr)	9,627,514	5,511,918	4,776,772

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.4	17.1	17.8
NSE VIX	13.0	12.6	17.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,692	0.5 %	2.5 %	Energy	18,975	(0.2) %	2.5 %
IT	30,371	1.4 %	16.9 %	Pharma	13,920	(0.3) %	12.5 %
Metals	5,811	5.0 %	38.7 %	Finance	16,514	0.4 %	3.8 %
Auto	9,957	(0.4) %	(0.7) %	PSU	2,449	3.3 %	10.6 %
FMCG	35,990	(1.0) %	3.2 %	Real Estate	398	1.6 %	18.4 %

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>
Hindalco I	458	10.0 %	30.8 %	Indus Towe	222	(4.7) %	(13.1) %
Tata Steel	1,459	6.9 %	69.0 %	Colgate-Pa	1,710	(4.6) %	9.4 %
Vedanta	289	6.8 %	24.8 %	ICICI Pru	636	(2.5) %	43.2 %
L & T Info	4,640	6.5 %	12.8 %	Maruti Suz	6,994	(2.4) %	1.0 %
NMDC	183	4.9 %	32.0 %	Adani Gree	924	(2.3) %	(20.3) %

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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