



31 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,153	0.5 %	35.1 %
BSE SENSEX	37,736	(0.9) %	33.7 %
CNX BANK	21,647	0.0 %	18.9 %
CNX MIDCAP	15,406	0.0 %	34.3 %
CNX SMALLCAP	4,969	0.0 %	40.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,314	(0.9) %	(7.8) %
S&P 500	3,246	(0.4) %	0.5 %
FTSE 100	5,990	(2.3) %	(21.2) %
HANG SENG	24,711	(0.7) %	(13.4) %
NIKKEI	22,339	(0.3) %	(3.7) %
SHANGHAI COMPOSITE	3,287	(0.2) %	6.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.61	0.0 %	4.8 %
EUR/USD	1.18	0.5 %	5.1 %
GBP/USD	1.30	1.0 %	(1.2) %
USD/JPY	105.01	(0.2) %	(3.3) %
USD/AUD	1.40	(0.2) %	(2.1) %
USD/SGD	1.37	(0.3) %	2.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	(3.3) %	(34.7) %
Gold(INR/10g)	53,099	0.5 %	36.2 %
Gold Comex(USD/oz)	1,961	0.1 %	27.1 %
SILVER(INR/1Kg)	61,898	(3.5) %	34.4 %
Aluminium(USD/MT)	1,682	(0.3) %	(5.1) %
Copper(USD/MT)	6,434	(0.6) %	4.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.5	(0.0) %	(1.4) %

Global Economy: The US Commerce Department released a report on Thursday showing a record contraction in U.S. economic activity in the second quarter. The report said real gross domestic product plummeted at an annual rate of 32.9% in the second quarter following a 5% slump in the first quarter. First-time claims for U.S. unemployment benefits increased for the second straight week in the week ended July 25th. The initial jobless claims edged up to 1.434 million, an increase of 12,000 from the previous week's revised level of 1,422,000. Germany's gross domestic product fell 10.1% sequentially after shrinking 2% in the first quarter, amid coronavirus pandemic, data from Destatis revealed Thursday. This was the largest decline since the records began in 1970. There was a massive slump in exports and imports of goods and services as well as for household final consumption expenditure and capital formation in machinery and equipment. On a yearly basis, GDP declined by calendar-adjusted 11.7% in the second quarter. Price-adjusted GDP also declined 11.7%. Eurozone unemployment rate rose to 7.8% in June from 7.7% in May, although member countries started to phase out the coronavirus containment measures, data from Eurostat showed Thursday. The number of unemployed increased by 203,000 from the previous month to 12.685 million in June. Eurozone economic confidence improved to a four-month high in July. The economic sentiment index climbed to 82.3 in July from 75.8 in the previous month, survey data from European Commission showed.

Global Equities: US stocks flipped back on weak economic data and soaring Covid-19 casualties in the country.

Indian Economy: According to the latest Gold Demand Trends update from the World Gold Council or WGC, Indian jewellery demand plunged in Q2 due to nationwide lockdown, lost festival demand and the higher gold price. Indian jewellery demand fell 74% y-o-y to 44 tonnes (t) - the lowest quarterly total in WGC series. H1 demand was down 60% to an all-time low for our series of 117.8t. FICCI commended the government on the National Education Policy (NEP), 2020 that looks fairly well structured and seems to have captured most of the important aspects of education.

Equity Markets: Key domestic barometers tumbled on Thursday, dragged by selling in private lenders. Negative global cues spoiled investors' sentiment. Trading was volatile as the July 2020 F&O contracts expired today, 30 July 2020. The barometer index, the S&P BSE Sensex dropped 335.06 points or 0.88% at 37,736.07. The Nifty 50 index lost 100.70 points or 0.90% at 11,102.15. The Nifty declined about 1.8% in two sessions.

Corporate News: RIL's consolidated profit during June quarter 2020 (which included exceptional gain of Rs 4,966 crore from stake sale to BP in Reliance BP Mobility) increased 102.4% sequentially and the year-on-year increase was 30.6%. Reliance's consolidated revenue for the quarter stood at Rs 1,00,929 crore compared to Rs 1,51,461 crore QoQ and Rs 1,74,087 crore year-on-year. The board of InterGlobe Aviation, the parent of the country's largest airline IndiGo, on Thursday decided to further deliberate on plans to raise funds. Tata Communications NSE -0.33 % on Thursday posted over threefold jump in its consolidated profit after tax to Rs 258 crore in the first quarter ended June 30, on the back of jump in data business. The company had registered a profit of Rs 77 crore in the corresponding period of the previous year.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(38.9)	51.7	66.4
MF(INR cr)	(300.3)	(366.5)	(120.5)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	68,009	61,753	55,170
F&O(INR cr)	4,188,028	1,945,390	1,543,502

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.8	27.0	32.5
NSE VIX	24.7	25.2	33.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,647	(1.9) %	18.9 %	Energy	15,439	(1.9) %	43.3 %
IT	18,004	0.7 %	49.5 %	Pharma	10,766	3.1 %	53.2 %
Metals	2,135	(1.2) %	37.4 %	Finance	10,795	(1.8) %	20.7 %
Auto	7,288	(0.6) %	56.5 %	PSU	1,392	(1.9) %	8.5 %
FMCG	30,696	(0.8) %	16.5 %	Real Estate	198	(0.1) %	15.1 %

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>
Divi's Lab	2,562	5.7 %	36.5 %	B P C L	419	(7.6) %	38.3 %
Dr Reddy's	4,517	5.0 %	45.9 %	Shriram Tr	684	(5.7) %	12.4 %
SBI Life I	914	3.7 %	43.8 %	IndusInd B	520	(5.6) %	51.9 %
Lupin	890	3.6 %	53.8 %	I O C L	89	(4.4) %	12.2 %
Sun Pharma	510	3.4 %	48.4 %	Piramal En	1,370	(3.8) %	46.3 %

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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