



31 Jul.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,857	0.1 %	10.7 %
BSE SENSEX	81,455	0.1 %	10.1 %
CNX BANK	51,499	0.2 %	8.2 %
CNX MIDCAP	58,623	0.4 %	19.9 %
CNX SMALLCAP	19,208	0.9 %	21.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	40,743	0.5 %	8.0 %
S&P 500	5,436	(0.5) %	14.6 %
FTSE 100	8,274	(0.2) %	7.2 %
HANG SENG	17,003	(1.4) %	1.3 %
NIKKEI	38,526	0.2 %	15.7 %
SHANGHAI COMPOSITE	2,879	(0.4) %	(2.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.71	(0.0) %	0.8 %
EUR/USD	1.09	0.1 %	(1.6) %
GBP/USD	1.29	(0.1) %	1.1 %
USD/JPY	153.82	0.4 %	9.0 %
USD/AUD	1.53	(0.1) %	4.0 %
USD/SGD	1.34	(0.0) %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	(3.2) %	7.7 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,384	(0.1) %	14.7 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,204	(1.1) %	(5.7) %
Copper(USD/MT)	8,906	(1.2) %	5.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.2	(0.0) %	0.3 %

Global Economy: A report released by the Conference Board on Tuesday showed consumer confidence in the U.S. unexpectedly improved from a downwardly revised level in the month of July. The Conference Board said its consumer confidence index rose to 100.3 in July from a downwardly revised 97.8 in June. The manufacturing sector in China continued to contract in July, and at a slightly faster rate, the latest survey from the National Bureau of Statistics revealed on Wednesday with a manufacturing PMI score of 49.4. The survey also showed that the non-manufacturing PMI came in at 50.2 Composite PMI was also at 50.2, down from 50.5 a month earlier. The euro area economy logged a steady growth in the second quarter despite an unexpected contraction in Germany, official data showed on Tuesday. Gross domestic product advanced 0.3 percent in the three months to June, which was similar to the first quarter growth, preliminary flash estimate published by Eurostat showed on Tuesday. Year-on-year, economic growth rose slightly to 0.6 percent. Germany's economy contracted unexpectedly in the second quarter as Gross domestic product shrank 0.1 percent on a quarterly basis in the second quarter, reversing the first quarter's 0.2 percent expansion, preliminary data from Destatis showed. On a yearly basis, GDP shrank by calendar-adjusted 0.1 percent, the same pace of fall as reported in the first quarter. Consumer prices in Australia were up 1.0 percent on quarter in the second quarter of 2024, the Australian Bureau of Statistics said on Wednesday.

Global Indices: The Nasdaq tumbled 222.78 points or 1.3 percent to 17,147.41, ending the session at its lowest closing level in well over a month. The S&P 500 also fell 27.10 points or 0.5 percent to 5,436.44, while the narrower Dow climbed 203.40 points or 0.5 percent to 40,743.33.

Indian Economy: Keeping in view India's vision of becoming 'Atmanirbhar', Production Linked Incentive (PLI) Schemes for 14 key sectors have been announced with an outlay of Rs. 1.97 lakh crore (over US\$26 billion) to enhance India's Manufacturing capabilities and Exports. As on date, 755 applications have been approved across 14 sectors. Investment of Rs. 1.23 lakh crore have been realized till March 2024 resulting in employment generation of around 8 lakhs.

Equity Market: The S&P BSE Sensex rose 99.56 points or 0.12% to 81,455.40. The Nifty 50 index rose 21.20 points or 0.09% to 24,857.30.

Corporate News: Gas Authority of India (Gail) reported a 77.5 per cent rise in consolidated net profit at Rs 3,183.35 crore in Q1FY25 from Rs 1,793 crore in the year-ago period. Gail's net profit jumped 28.6 per cent Q-o-Q from Rs 2,474 crore. The latest growth in net profits was propelled by increased domestic natural gas marketing volume and higher gas transmission volumes. Tata Consumer Products: Tata Consumer Products' net profit in Q1FY25 dropped 8.3 per cent Y-o-Y due to higher exceptional items and lower share of profits from associates and joint ventures. The company's net profit fell to Rs 290.3 crore in the quarter under review from Rs 317 crore reported in the first quarter of FY24.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(325.6)	201.5	39.2
MF(INR cr)	3,026.8	507.5	1,484.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	148,935	150,077	136,722
F&O(INR cr)	50,328,645	37,230,129	37,350,066

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.6	193.9	57.3
NSE VIX	12.9	13.6	15.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	51,499	0.2 %	8.2 %	Energy	43,908	1.1 %	11.2 %
IT	40,776	(0.1) %	16.4 %	Pharma	21,541	(0.6) %	12.1 %
Metals	9,468	0.2 %	10.6 %	Finance	23,338	0.1 %	10.1 %
Auto	26,581	0.6 %	24.3 %	PSU	7,429	(0.1) %	4.4 %
FMCG	61,819	(1.1) %	14.7 %	Real Estate	1,098	0.4 %	16.8 %

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>
Adani Ener	1,125	6.9 %	1.2 %	Varun Beve	1,577	(6.4) %	12.9 %
Colgate-Pa	3,367	4.9 %	23.9 %	Torrent Ph	3,111	(2.7) %	16.3 %
Tata Motor	1,162	3.4 %	17.1 %	Godrej Con	1,440	(2.6) %	17.2 %
NTPC	407	3.3 %	18.9 %	LTIMindtre	5,673	(2.0) %	16.2 %
Tata Motor	793	3.2 %	20.3 %	Avenue Sup	5,027	(1.7) %	12.1 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CPI q/q	31-07-2024	07:00	AUD	-	0.01
GDP m/m	31-07-2024	18:00	CAD	-	0.003
UBS Economic Expectations	31-07-2024	13:30	CHF	-	17.5
French Prelim CPI m/m	31-07-2024	12:15	EUR	-	0.001
German Unemployment Change	31-07-2024	13:25	EUR	-	-
Core CPI Flash Estimate y/y	31-07-2024	14:30	EUR	-	0.029
Prelim Industrial Production m/m	31-07-2024	05:20	JPY	-	0.036
Consumer Confidence	31-07-2024	10:30	JPY	-	36.4
Building Consents m/m	31-07-2024	04:15	NZD	-	(0.017)
ANZ Business Confidence	31-07-2024	06:30	NZD	-	6.1
ADP Non-Farm Employment Change	31-07-2024	17:45	USD	-	-
Chicago PMI	31-07-2024	19:15	USD	-	47.4
Pending Home Sales m/m	31-07-2024	19:30	USD	-	(0.021)
Crude Oil Inventories	31-07-2024	20:00	USD	-	-
Federal Funds Rate	31-07-2024	23:30	USD	-	0.055

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