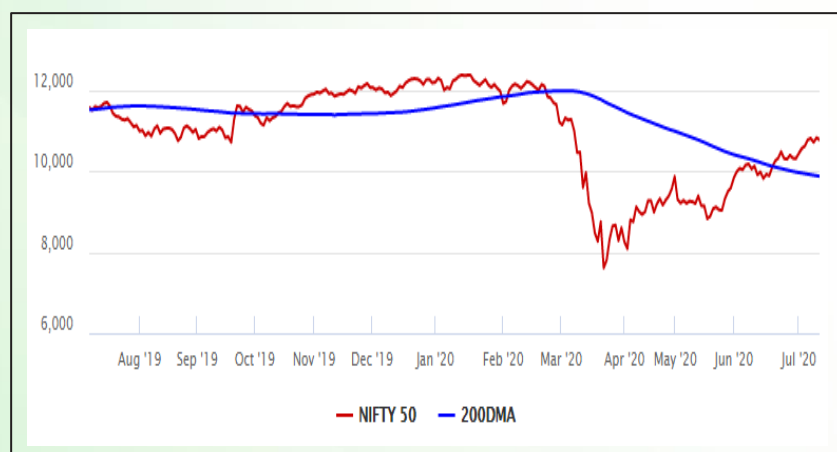


Equity Market

- ❖ Sensex slipped 143 points to settle at 36,594
- ❖ Index VIX flat at 24.94
- ❖ Nifty P/E at 28.27, Nifty Midcap 100 P/E at 130.30

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	% chg	52 wk high	52 wk low
Nifty 50	10768.1	-0.42	12430.5	7511.1
Nifty Mid cap 100	15253.6	-0.71	18495.9	10750.0
Nifty Small cap 100	4870.3	-0.20	6401.1	3202.9
Bank	22398.5	-2.22	32613.1	16116.3
Auto	7041.1	-0.63	8501.2	4452.2
FMCG	30821.2	0.49	32644.9	22699.1
Pharma	10072.3	0.85	10404.4	6242.9
Realty	206.1	0.66	336.4	160.9

Factors driving the market

- ❖ Stock market ended Friday's volatile session in the negative territory amid weak global cues
- ❖ HDFC, HDFC Bank, ICICI Bank, and Axis Bank contributed the most to the Sensex's fall, Reliance top gainer
- ❖ On a weekly basis, Sensex gained 1.6 per cent while Nifty rose 1.5 per cent

Nifty Top Gainers/Losers

Index	Value	52 wk high	52 wk low
Top Gainers			
Reliance	1880.2	1884.6	867.0
HUL	2230.1	2614.3	1659.1
Sun Pharma	493.0	512.7	312.0
Top Losers			
Axis Bank	439.4	790.0	286.0
GAIL	102.5	150.8	65.0
IndusInd Bank	540.3	1596.6	235.6

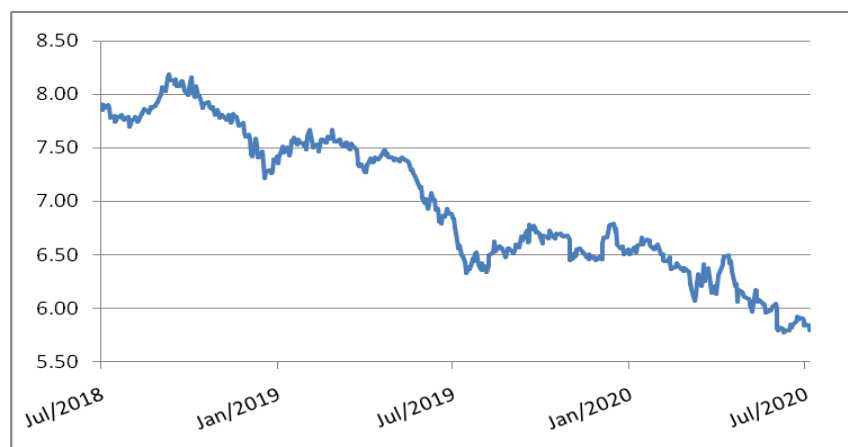
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
10-Jul-20	7660.0	4282.7	3377.3
09-Jul-20	5355.7	6415.2	(1059.5)
08-Jul-20	4039.1	5704.9	(1665.8)
Total Jun-2020	170846.4	149014.5	21831.6
Total May-2020	130298.5	115729.8	14568.8
Total 2019	1437559.6	1336438.9	101120.8

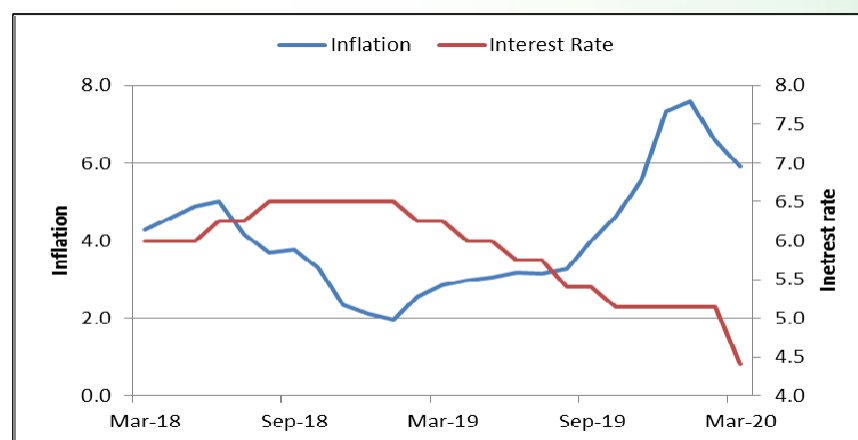
Debt Market

- ❖ Corporate Stress expected to grow to 18.21% of outstanding quantum, says Ind-Ra report
- ❖ Religare Fin submits revised debt recast plan
- ❖ Fitch Affirms Glenmark Pharmaceuticals at 'BB', outlook stable
- ❖ Pandemic may lead to higher NPAs, banks need more capital buffer against shocks: RBI Governor
- ❖ Voda Idea pays Rs 2,900 cr towards NCD maturities

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	3.15
Repo rate	4.00
10 Yr Gsec yield	5.76
1-mth CP rate	4.04
3-mth CP rate	3.45
6-mth CP rate	4.10
1 Yr CP rate	3.96
1-mth CD rate	3.20
3-mth CD rate	3.20
6-mth CD rate	3.50
1 Yr CD rate	3.98

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Jul-13	G-sec auction	--
Jul-13	Total repo	--
Jul-13	Total reverse repo	6,59,893
Jul-13	Marginal standing facility	20
Jul-13	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
10-Jul-20	420.4	1939.6	(1519.2)
09-Jul-20	875.7	619.1	256.6
08-Jul-20	1957.8	1984.5	(26.7)
Total Jun-2020	21934.6	23479.5	(1545.0)
Total May-2020	16020.9	38955.9	(22935.0)
Total 2019	392458.9	366578.5	25880.4

Debt Fund Benchmark Indices

Market Indices	1 M (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)
Crisil Composite Bond Fund Index	2.27	12.62	8.85	9.58
Crisil Short Term Bond Fund Index	2.05	11.54	8.54	8.67
Crisil ST Debt Hybrid 75+25 Index	3.12	8.73	7.78	8.57
Crisil Liquid Fund Index	0.36	5.73	6.78	7.01

Macro

- ❖ IIP contracts for 3rd straight month in May at -34.7% after a historic fall of 55.5% in April
- ❖ India's consumer food price inflation stands at 9.28% in May compared to 8.76% in March
- ❖ Govt plans to make electronics sector worth \$400 billion by 2025
- ❖ U.S. remains India's top trading partner in 2019-20
- ❖ Banks, post offices can now find out TDS on large cash withdrawals

	Q3 FY2020(%)	Q2 FY2020(%)	Q3 FY2019(%)
GDP growth	4.7	4.5	6.6

Commodity Prices				
	Current	Week ago	Month ago	Year ago
Brent crude(\$/bbl)	43.25	42.80	41.73	67.01
Gold (RS/10 gms)	49,143	48,227	46,782	34,189

	May - 20 (%)	Apr - 20 (%)	Year ago (%) (May - 19)
CPI (Food)	9.28%	--	3.05
WPI	-3.21	--	2.45
Core Sector Output	-23.40	-38.12	3.80
IIP	-34.70	-55.50	3.10

Global market trends

- ❖ Wall Street gained on Friday as Gilead data offsets coronavirus fears; Dow leads gains
- ❖ Gold to benefit if China recovers strongly from second virus wave: Goldman
- ❖ UK to create 'freeports,' bring massive tax cuts a year into Brexit: Report
- ❖ China warns of consequences if UK cuts Huawei out of its telecom infra
- ❖ Oil prices climb more than 2% on improved forecast for demand recovery

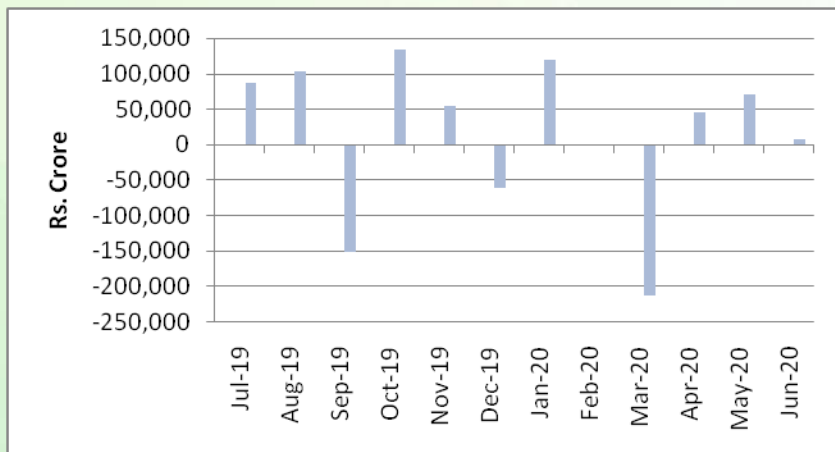
INR vs Global currency		
	Current	Prev close
USD	75.15	75.20
GBP	95.07	95.16
Euro	85.09	85.14
Yen	0.703	0.704
Yuan	10.74	10.74

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	0.76	-1.01	-3.69	-19.06
Hang Seng	-1.84	1.40	2.71	-8.78
Nikkei 225	-1.06	-0.07	-3.61	3.52
S&P 500	1.05	1.76	-0.16	6.41
Shanghai Composite	-1.95	7.31	14.93	16.05

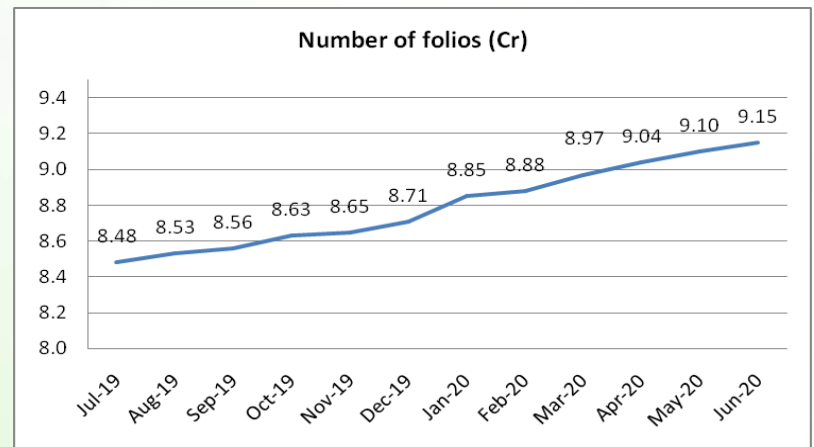
Mutual Fund Roundup

- ❖ Mutual Fund inflows crash in June to Rs 7,266 crore
- ❖ Equity mutual fund inflows fall sharply to Rs 240.6 crore; multi cap and large cap funds see high outflows
- ❖ Debt fund inflows at Rs 2,862 crore; Liquid funds see high outflow on account of advance tax payment
- ❖ Hybrid funds continue to bleed; Aggressive hybrid funds see outflow of Rs 1705 crore

Mutual fund inflows



Mutual fund folio growth



(Data source: NSE, NSDL, FIMMDA, investing.com, tradingeconomics.com, fx-rate.net, ACEMF, AMFI, RBI, equitymaster.com)

(News source: Economic Times, Business Standard)