

Broad Indices	Jul 05	1D % Chg	3M % Chg	1Y % Chg	PE
S&P BSE Sensex	79997	-0.07	7.74	22.23	24.34
Nifty 50	24324	0.09	8.04	25.39	23.15
BSE Mid cap	47438	0.75	16.18	63.61	33.11
Nifty Midcap 100	57089	0.83	14.13	58.47	42.76

Sectoral Indices	Jul 05	1D % Chg	3M % Chg	1Y % Chg
S&P BSE Auto	57826	0.12	17.06	64.59
S&P BSE Bankex	60332	-0.18	10.52	18.50
S&P BSE CD	58700	-0.43	9.72	36.19
S&P BSE CG	75131	1.55	20.27	84.51
S&P BSE FMCG	20927	0.97	7.75	8.66
S&P BSE Healthcare	38247	1.00	7.60	47.94
S&P BSE IT	38483	-0.13	6.71	27.87
S&P BSE Metal	33739	0.36	14.24	62.27
S&P BSE Oil & Gas	30152	1.77	8.33	61.29
S&P BSE Power	8095	1.24	15.36	100.49
S&P BSE Realty	8741	-0.04	18.23	107.63

Nifty			
Top Out performers	% Change	Top Under performers	% Change
ONGC	4.02	HDFC Bank	-4.58
SBI	2.44	Titan Company	-2.00
RIL	2.23	Tata Steel	-0.90
Britannia	2.22	M&M	-0.76
HUL	2.05	LTIMindtree	-0.69

Foreign & Domestic flows	FII Inv	MF Inv	DII Inv
Rs. Cr (Equity)	Jul 04	Jul 03	Jul 05
Buy	16289	6674	12695
Sell	10778	7385	14346
Net	5512	-711	-1651
Net (YTD)	9067	187364	238052

Policy rates	Jul 05	1W Ago
Repo (%)	6.50	6.50
Reverse repo (%)	3.35	3.35
CRR (%)	4.50	4.50
Overnight rates	Jul 05	1W Ago
Call (%)	6.05	6.25
10 Yr Gilt(%)^	6.99	7.01
TREP (%)	6.38	6.75
Short-term debt	Jul 05	1W Ago
3-month CPs (%)	7.78	7.80
6-month CPs (%)	7.85	7.90
3-month CDs (%)	7.12	7.15
6-month CDs (%)	7.40	7.43
182-day T-bill (%)^	6.88	6.92
364-day T-bill (%)^	6.92	6.94
Long-term debt	Jul 05	1W Ago
3-Y G-sec (%)	6.95	6.98
5-Y G-sec (%)	6.99	7.02
10-Y G-sec (%)	6.99	7.01

^Weighted average yield

Indian Equity

- Indian equities ended flat on Friday after initial gains tracking positive global cues were trimmed as banking stocks were under pressure.
- The top gainers were ONGC, State Bank of India, Reliance Industries, Britannia and Hindustan Unilever, up 2.05-4.02%.
- The top losers were HDFC Bank, Titan Company, Tata Steel, Mahindra & Mahindra and LTI Mindtree, down 0.69-4.58%.

Indian Debt

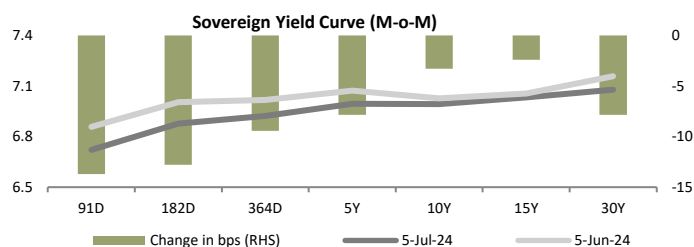
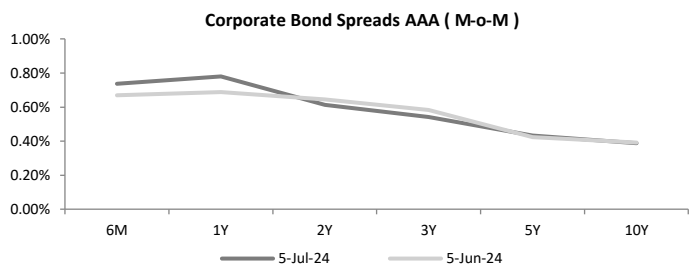
- The interbank call money rate ended higher at 6.05% on Friday compared to 5.75% on Thursday.
- Government bond prices ended flat on Friday due to a lack of fresh cues.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended flat at 7.00% on Friday.

Economy and Government

- India's forex reserves dropped \$1.713 bn to \$651.997 bn for the week ended June 28.
- Finance Minister Nirmala Sitharaman wrapped up consultations with industry and social sector representatives ahead of presenting her seventh Union Budget on July 23.
- SEBI issued new guidelines to streamline operations and enhance the ease of doing business for credit rating agencies.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.93	7.68	8.43	8.49	9.77
3-Yr	6.95	7.62	8.37	8.43	9.71
5-Yr	6.99	7.55	8.40	8.45	9.74
10-Yr	6.99	7.50	8.35	8.40	9.69

* Weighted average yields



Global Indices	Jul 05	1D % Chg	3M % Chg	1Y % Chg
DJIA	39376	0.17	1.21	14.84
Nasdaq	18353	0.90	12.95	33.07
FTSE 100	8204	-0.45	3.70	10.24
DAX	18475	0.14	1.65	15.92
Nikkei 225	40912	0.00	4.92	22.72
Hang Seng	17800	-1.27	6.43	-6.86
KOSPI	2862	1.32	5.45	10.98

Global 10 yr Sov. Yields (%)	Jul 05	1D Ago	3M Ago	1Y Ago
US	4.28	4.36	4.40	3.95
UK	4.13	4.20	4.10	4.53
German	2.53	2.59	2.40	2.48
Japan	1.071	1.08	0.77	0.38

Commodity Prices	Jul 05	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	87.55	87.43	91.17	76.65
NYMEX Crude Oil (\$/bbl)	83.16	83.88	86.91	71.79
Gold (Rs / 10 gm)#	72640	72469	69882	58631

ibjarrates spot prices

Currencies Vs INR	Jul 05	1D Ago
USD	83.48	83.50
GBP	106.78	106.48
Euro	90.39	90.16
100 Yen	51.95	51.78
Forex Reserve (\$ bn)*	652.00	653.71

* Data pertains to Jun 28 and to Jun 21 respectively

Source: CRISIL

Key Macro Indicators	
CPI	4.75% (May -2024)
WPI	2.61% (May -2024)
IIP	5.0% (April -2024)
GDP Growth Rate	7.8% (January-March FY24)

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Capital Market

- Bank of Baroda plans to raise capital up to Rs 7,500 cr through additional Tier 1 (AT1) and Tier 2 bonds to meet prudential regulator norms and support business growth.
- JM Financial's board has approved the acquisition of a 42.99% stake in JM Financial Credit Solutions (JMFCSL) for Rs 1,282 cr.
- QMS Medical Allied Services acquired a 51% stake in Saarthi Healthcare for Rs 450 cr.
- Godrej Seeds & Genetics acquired shares worth Rs 417.9 cr in Godrej Consumer Products on Thursday through bulk deals.
- Punjab & Sind Bank to open 100 branches across the country in the current financial year as part of the strategy to expand its reach

Global Equity

- Wall Street stocks ended higher on Friday after a much-anticipated jobs report hinted weakness in labour market, which boosted hopes that interest rates might soon be lowered.
- 10-year US bond yield fell to 4.28% after jobs data indicated weak labor market which boosted hopes that Fed may cut rates in September.
- FTSE index closed lower on Friday pound strengthened against the US dollar.
- Asian markets were trading lower at 8.30 AM.

International

- US Nonfarm Payroll came at 206000 in June, compared to 218,000 in May, while unemployment rate rose to 4.1% from 4%.
- Eurozone retail sales increased 0.3% on year in May, following an upwardly revised 0.6% rise in April.
- The UK Halifax House Price Index increased 1.6% on year in June, the same as an upwardly in May.
- Japan Flash leading economic index climbed to 111.1 in May from 110.9 in April, while Flash coincident index rose to 116.5 from 115.2.
- Japan's current account surplus rose to JPY 2,849.9 bn in May compared to JPY 2,010.1 bn May.

Upcoming market indicators

- US Consumer Inflation Expectations, June (July 08)
- US Fed Chair Powell Testimony (July 09)
- Eurozone Consumer Inflation Expectations, May (July 09)
- China Inflation Rate, June (July 10)
- US Inflation, June (July 11)
- US CPI, June (July 11)
- UK GDP, May (July 11)
- US PPI, June (July 12)
- Japan Industrial production, May (July 12)
- India Inflation Rate, June (July 12)
- India Industrial/manufacturing Production, May (July 12)