

Indices	Close	Previous	Chg. %
SENSEX	58,116	57,570	0.95%
NIFTY	17,340	17,158	1.06%
NIFTY BANK	37,903	37,491	1.10%
NIFTY AUTO	12,954	12,543	3.27%
NIFTY IT	29,220	29,152	0.23%

Indices	Close	Previous	Chg. %
DJIA	32,798	32,845	-0.14%
NASDAQ	12,369	12,391	-0.18%
S&P 500	4,119	4,130	-0.28%
DAX	13,480	13,484	-0.03%
CAC 40	6,437	6,449	-0.18%
FTSE 100	7,413	7,423	-0.13%
HANG SENG	20,166	20,157	0.05%
SSE INDEX	3,260	3,253	0.21%
NIKKIE 225	27,993	27,802	0.69%

Nifty Gainers	Chg. %	Nifty Losers	Chg. %
TATAMOTORS	6.77	SUNPHARMA	-2.86
M&M	6.02	HDFCLIFE	-1.89

Type	Current	Previous
Gold	1794.50	1779.60
Brent Crude	100.17	110.01

Type	Current	Previous	Change bps
G- Sec -6.54% GOI	7.3196	7.3316	-1.20
T-Bill 91 days	5.6229	5.6229	0
10 Year US Treasury	2.642	2.681	-3.9

Rate	
Repo Rate	4.90
Cash Reserve Ratio	4.50
RBI Bank Rate	5.15
Statutory Liquidity Ratio	18.00
CPI	7.01

Markets Extend Gains for Another Session

- Strong economic data on the domestic front, falling oil prices and the rupee's rebound on the back of a weakening dollar in international market also buoyed investor sentiment.
- India's manufacturing activity expanded at the fastest pace in eight months in July, driven by significant growth in output and new orders, survey results from S&P Global showed earlier today.
- GST collections for July remained above Rs.1.4 lakh crore for the fifth straight month in July and monthly automobile sales showed a sharp rise in July, adding to optimism about India's growth story.
- Eicher Motor's Total sales of motorcycles in July rose 26% YoY to 55,555 units. Hero MotoCorp's Total sales in July fell 2% YoY to 445,580 units. TVS Motor's Total sales in July rose 13% YoY to 314,639 units.
- India sold airwaves worth Rs 1.50 lakh crore in the weeklong 5G spectrum auction. A total of 51,236 megahertz or 71% of the 72,098 MHz put up for auction was sold. Mukesh Ambani-controlled Reliance Jio Infocomm Ltd. was the biggest buyer, followed by Bharti Airtel Ltd., Vodafone Idea Ltd., and Gautam Adani-owned Adani Data Networks Ltd.

Global & Asian market overview

- **European stocks** which had their best month of the year in July, began the new month on a somewhat volatile note and ended slightly lower with investors digesting the latest batch of earnings updates and weighing growth prospects amid rising interest rates and policy tightening by central banks.
- **US stocks** The mood in the market was quite cautious due to worries about a possible recession after data showed weakening factory activity in Asia and Europe. Data showing manufacturing activity in the U.S. rose at the weakest rate in nearly two years hurt as well. Fairly encouraging corporate earnings updates helped limit market's downside. Shares of energy firms drifted down after oil prices tumbled amid concerns about outlook for energy demand due to global economic slowdown. Bank stocks were weak as well.
- **Asian stocks** Chinese stocks fluctuated before ending slightly higher for the day. Japanese shares advanced as earnings optimism outweighed lingering concerns about a challenging macroeconomic environment.

Debt Market

- **US Treasuries** Bond prices initially showed a lack of direction but climbed firmly into positive territory as the day progressed. Subsequently, the yield, slid 3.9 basis points to 2.642%.
- **G-sec** The G-sec prices edged higher. Subsequently, the yield on the G-sec, plunged 1.20 basis points and closed at 7.3196% from 7.3316%.

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