



01 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,580	1.0 %	16.1 %
BSE SENSEX	32,424	0.7 %	14.7 %
CNX BANK	19,297	0.7 %	6.0 %
CNX MIDCAP	13,273	1.1 %	15.7 %
CNX SMALLCAP	4,003	0.9 %	13.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,383	(0.1) %	(11.1) %
S&P 500	3,044	0.5 %	(5.8) %
FTSE 100	6,077	(2.3) %	(20.1) %
HANG SENG	22,961	(0.7) %	(19.6) %
NIKKEI	21,878	(0.2) %	(5.7) %
SHANGHAI COMPOSITE	2,852	0.2 %	(7.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.11	(0.2) %	5.5 %
EUR/USD	1.11	0.6 %	(1.0) %
GBP/USD	1.23	0.4 %	(6.5) %
USD/JPY	107.51	(0.2) %	(1.1) %
USD/AUD	1.50	(0.3) %	5.5 %
USD/SGD	1.41	(0.3) %	5.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	35	4.2 %	(42.0) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,743	0.6 %	13.0 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,515	1.0 %	(14.5) %
Copper(USD/MT)	5,333	1.0 %	(13.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	(0.0) %	(1.3) %

Global Economy: Consumer sentiment in the US improved in the month of May, revised data released by the University of Michigan on Friday showed. The report showed the consumer sentiment index for May was downwardly revised to 72.3 from the preliminary reading of 73.7. Despite the unexpected downward revision, the consumer sentiment index is still above the April reading of 71.8. The slight uptick by the consumer sentiment index came as the current economic conditions index jumped to 82.3 in May from 74.3 in April. Eurozone inflation slowed to 0.1% in May from 0.3 percent in April, driven by a sharp fall in energy prices, data from Eurostat showed Friday. This was the lowest since June 2016, when prices remained unchanged. Headline inflation remained well below the European Central Bank's target of "below, but close to 2%." On a monthly basis, consumer prices edged down 0.1% in May. Excluding food, alcohol and tobacco, core inflation held steady at 0.9% in May. Japan industrial output fell a seasonally adjusted 9.1% in April, the Ministry of Economy, Trade and Industry said on Friday, following the 3.7% drop in March. On a yearly basis, industrial production tumbled 14.4% after slipping 5.2% in the previous month. Upon the release of the data, the METI downgraded its assessment of industrial production, saying that it is declining rapidly. Shipments were down 8.8% on month and 15.9% on year, while inventories eased 0.3% on month and added 2.7% on year. Australia private sector credit in Australia was flat on month in April, the Reserve Bank of Australia said on Friday, following the 1.1% increase in March. On a yearly basis, credit rose 3.6% - unchanged from the March reading.

Global Equities: US stocks stayed supported in the last session amid sustained buying. The Nasdaq reached a new three-month closing high.

Indian Economy: India's Gross Domestic Product (GDP) growth moderated sharply to 3.1% in the quarter ended March 2020 from 4.1% in the preceding quarter and 5.7% growth in the corresponding quarter of last year. The growth of gross value added has also moderated to 3.0% in the quarter ended March 2020. Among the key sectors, the manufacturing sector has posted a 1.4% decline in output, while recording consistent decline in output for the third straight quarter. The output of the construction sector also declined 2.2%. Further within the industrial sector, the output of the mining and quarrying sector has improved 5.2% and the output of utilities sector gained 4.5% in the quarter ended March 2020. The output of Eight Core Industries declined by 38.1% in April 2020 compared to decline of 9% in the previous month of March 2020. In view of nationwide lockdown during April 2020 due to COVID-19 pandemic, various industries experienced substantial loss of production. Final growth rate of Index of Eight Core Industries for January 2020 remains unchanged at 2.2%. The Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP).

Equity Markets: Key market barometers ended with modest gains on Friday, ahead of India's Q4 GDP data. The buying was supported by hope of further opening up of the economy. The barometer S&P BSE Sensex surged 223.51 points or 0.69% at 32,424.10. The Nifty 50 index gained 90.20 points or 0.95% at 9,580.30.

Corporate News: HCL Technologies has showed its intention to acquire Cisco's self-optimizing network (SON) technology. Torrent Gas Ltd has commissioned 21 CNG selling stations in five states after lockdown relaxations allowed resumption of some economic activities. Rising crude oil prices could keep the local oil marketing companies share prices under check.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	263.5	91.7	45.0
MF(INR cr)	2,252.1	177.1	(151.0)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	87,231	56,078	52,810
F&O(INR cr)	772,014	1,306,944	1,230,143

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.5	30.9	36.1
NSE VIX	30.2	36.6	40.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,297	0.7 %	6.0 %	Energy	13,061	1.7 %	21.2 %
IT	14,011	(0.1) %	16.3 %	Pharma	9,769	3.2 %	39.0 %
Metals	1,880	1.9 %	21.0 %	Finance	9,527	1.1 %	6.5 %
Auto	6,219	1.7 %	33.5 %	PSU	1,130	0.6 %	(11.9) %
FMCG	29,297	3.0 %	11.1 %	Real Estate	180	4.3 %	4.6 %

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>
Vodafone I	7	12.9 %	114.8 %	Adani Tran	174	(4.5) %	(8.2) %
Colgate-Pa	1,392	7.2 %	12.0 %	Ashok Leyl	42	(4.4) %	3.3 %
I O C L	83	7.1 %	5.4 %	Power Fin.	75	(2.7) %	(15.4) %
Container	376	7.0 %	18.5 %	Adani Port	324	(2.4) %	32.3 %
ICICI Pru	393	6.9 %	14.7 %	Infosys	691	(2.3) %	14.6 %

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					

..... End of Report