



01 Jun.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,583	1.0 %	4.8 %
BSE SENSEX	51,937	1.0 %	3.8 %
CNX BANK	35,527	1.1 %	4.9 %
CNX MIDCAP	25,775	0.3 %	6.9 %
CNX SMALLCAP	9,267	0.1 %	11.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,529	0.2 %	12.8 %
S&P 500	4,204	0.1 %	11.9 %
FTSE 100	7,023	0.0 %	6.9 %
HANG SENG	29,152	0.1 %	6.1 %
NIKKEI	28,860	(1.0) %	5.9 %
SHANGHAI COMPOSITE	3,615	0.4 %	3.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.57	(0.1) %	(0.5) %
EUR/USD	1.22	(0.3) %	(0.6) %
GBP/USD	1.42	0.1 %	3.7 %
USD/JPY	109.43	0.4 %	6.1 %
USD/AUD	1.29	0.3 %	(0.4) %
USD/SGD	1.32	0.0 %	0.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(0.8) %	39.3 %
Gold(INR/10g)	48,933	0.8 %	(4.1) %
Gold Comex(USD/oz)	1,909	0.4 %	(2.1) %
SILVER(INR/1Kg)	71,456	1.2 %	3.8 %
Aluminium(USD/MT)	2,405	0.7 %	19.4 %
Copper(USD/MT)	10,160	1.3 %	28.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.0) %	0.7 %

**Global Economy:** Prospects for the world economy have brightened but the recovery is likely to remain uneven and, crucially, dependent on the effectiveness of public health measures and policy support, according to the Organization of Economic Cooperation and Development (OECD's) latest Economic Outlook. The OECD has revised up its growth projections across the world's major economies since its last full Economic Outlook in December 2020. It now sees global GDP growth at 5.8 % this year (compared with 4.2% projected in December), helped by a government stimulus-led upturn in the United States, and at 4.4% in 2022 (3.7% in December). The world economy has now returned to pre-pandemic activity levels, but real global income will still be some USD 3 trillion less by the end of 2022 than it would have been without a crisis. China manufacturing sector continues to expand at a slightly slower pace in May, with a manufacturing PMI score of 51.0 as compared to 51.1 in April, the latest survey from the National Bureau of Statistics showed on Monday. It does, however, remain well above the boom-or-bust line of 50 that separates expansion from contraction. The bureau also said its non-manufacturing PMI came in with a score of 55.2, as compared to 54.9 from the previous month's reading.

**Global Equities:** The European markets ended on a cautious note amid thin liquidity. Markets in the US were closed for Memorial Day holiday.

**Indian Economy:** Indian economy recorded a 1.6% growth in fourth quarter of 2020-21 fiscal indicating that an economic recovery was well underway before the second wave of the virus hit. The economy contracted by 7.3% for FY21, after a 4% growth in previous fiscal. Fiscal deficit for 2020-21 was at 9.3% of the gross domestic product (GDP), lower than 9.5% estimated by the Finance Ministry in the revised Budget estimates. The Organisation for Economic Co-operation and Development (OECD) cut its growth projection for India for FY22 to 9.9% from 12.6% estimated in March. OECD said while India is projected to be the fastest-growing G20 economy in 2021, it will also be the one which is the furthest away from its pre-crisis GDP trend.

**Equity Markets:** The domestic equity benchmarks ended with robust gains on Monday. Investor sentiment improved due to a steady decline in daily COVID-19 cases in India. Strength in other Asian stock markets also supported buying. The Nifty closed above the 15,550 mark. Metal shares rallied, followed by banks, financials and realty stocks. Auto stocks witnessed profit selling.

**Corporate News:** Honeywell Automation India reported lower profit at Rs 104.02 crore in Q4FY21 against Rs 111.14 crore in Q4FY20. Its revenue fell to Rs 672.7 crore from Rs 704.26 crore YoY. Soaring crude oil prices could keep stocks of oil refiners and marketing companies in focus.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	58.1	2.1	(41.5)
MF(INR cr)	(659.8)	13.4	163.6

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	77,653	76,775	74,072
F&O(INR cr)	3,079,550	4,332,642	4,494,572

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.7	19.9	18.6
NSE VIX	16.9	20.1	20.9

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,527	1.1 %	4.9 %	Energy	19,909	1.7 %	7.5 %
IT	27,115	(0.0) %	4.4 %	Pharma	14,052	0.8 %	13.5 %
Metals	5,162	2.1 %	23.2 %	Finance	16,664	1.0 %	4.7 %
Auto	10,492	(0.2) %	4.7 %	PSU	2,426	(0.7) %	9.6 %
FMCG	35,243	1.0 %	1.1 %	Real Estate	336	1.4 %	0.1 %

### 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>
GAIL (Indi)	160	4.6 %	14.1 %	M & M	808	(4.5) %	0.0 %
Muthoot Fi	1,312	3.6 %	8.0 %	Info Edg.(	4,345	(2.6) %	1.9 %
Reliance I	2,160	3.1 %	6.8 %	Aurobindo	998	(2.4) %	13.2 %
ICICI Bank	663	3.1 %	11.5 %	United Bre	1,253	(1.8) %	0.9 %
JSW Steel	711	3.1 %	39.7 %	Interglobe	1,759	(1.0) %	8.8 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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