



01 Jul.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,302	0.0 %	24.8 %
BSE SENSEX	34,916	(0.1) %	23.5 %
CNX BANK	21,370	0.0 %	17.4 %
CNX MIDCAP	14,704	0.0 %	28.2 %
CNX SMALLCAP	4,615	0.0 %	30.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,813	0.9 %	(9.6) %
S&P 500	3,100	1.5 %	(4.0) %
FTSE 100	6,170	(0.9) %	(18.9) %
HANG SENG	24,427	0.5 %	(14.4) %
NIKKEI	22,288	1.3 %	(4.0) %
SHANGHAI COMPOSITE	2,985	0.8 %	(3.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.22	(0.1) %	5.6 %
EUR/USD	1.12	0.1 %	0.1 %
GBP/USD	1.23	(0.4) %	(6.5) %
USD/JPY	107.79	0.6 %	(0.8) %
USD/AUD	1.45	(0.1) %	2.0 %
USD/SGD	1.39	0.2 %	3.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	39	(1.1) %	(35.8) %
Gold(INR/10g)	48,304	(0.1) %	23.9 %
Gold Comex(USD/oz)	1,801	2.4 %	16.8 %
SILVER(INR/1Kg)	48,399	(0.2) %	5.1 %
Aluminium(USD/MT)	1,602	0.8 %	(9.6) %
Copper(USD/MT)	6,038	1.4 %	(2.1) %

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: The US Conference Board said its consumer confidence index jumped to 98.1 in June from a downwardly revised 85.9 in May. MNI Indicators said its Chicago business barometer rose to 36.6 in June from 32.3 in May, but a reading below 50 still indicates a contraction in regional business activity. China manufacturing sector continued to expand in June, and at a slightly faster rate, the latest survey from the National Bureau of Statistics showed on Tuesday with a manufacturing PMI score of 50.9, up from 50.6 in May. It also moves further above the boom-or-bust line of 50 that separates expansion from contraction. The bureau also noted that its non-manufacturing index came in with a score of 54.4, up from 53.6 in the previous month. Eurozone inflation rose in June, preliminary data from Eurostat showed Tuesday. Inflation gained 0.3% from 0.1% in May. Headline inflation continued to remain well below the European Central Bank's target of "below, but close to 2%." Excluding food, alcohol and tobacco, core inflation eased a bit to 0.8% from 0.9% in May. UK gross domestic product fell 2.2% in Q1 following a nil growth in the fourth quarter of 2019, revised data published by the Office for National Statistics or ONS showed Tuesday. The latest drop was the joint largest contraction since the third quarter of 1979. On a yearly basis, GDP was down 1.7% in the first quarter, revised down from 1.6% estimated in May. Japan industrial production tumbled 25.9% on year in May as compared to a 15% drop in previous month, data from the Ministry of Economy, Trade & Industry showed. On a seasonally adjusted monthly basis, industrial production sank 8.4% following the 9.8% slide in April. Upon the release of the data, the METI downgraded its assessment of industrial production, saying that it is declining rapidly.

Global Equities: DOW edged up on the last trading session of June. Dow and S&P 500 recorded in their best quarterly performance in more than 20 years.

Indian Economy: Prime Minister Narendra Modi announced extension of the Pradhan Mantri Garib Kalyan Yojana (PMGKY) for another five months, which he said would cost the government Rs 90,000 crore. India recorded a current account surplus of \$0.6 billion, or 0.1% of GDP, for the January-March period as against a deficit of \$4.6 billion (0.7 per cent of GDP) in the year-ago period, marking the first quarterly surplus in 13 years. The pace of contraction of India's core infrastructure industry slowed in May with the core sector shrinking 23.4% compared to a record 37% in prior month.

Equity Markets: The Sensex and the Nifty ended a volatile session almost flat on Tuesday. PSU banks and pharma stocks tumbled. As per provisional closing, the barometer S&P BSE Sensex declined 13.86 points or 0.04% at 34,947.52. The Nifty 50 index fell 1.15 points or 0.01% at 10,305.85. The broader market underperformed the benchmarks. The S&P BSE Mid-Cap index fell 0.14% while the S&P BSE Small-Cap index declined 0.75%.

Corporate News: Oil & Natural Gas Corporation posted a standalone net loss of Rs 3,098.26 crore for the quarter ended March due to an exceptional item towards impairment loss of Rs 4,899 crore. The oil and gas explorer had posted a net profit of Rs 4,239.50 crore in the corresponding quarter last year. The company's revenue from operations declined 20% year-on-year (YoY) to Rs 21,456.20 crore. Jindal Steel and Power Ltd (JSPL) on Tuesday said it will offload its entire stake in Oman-based subsidiary for over \$1 billion (Rs 7,500 crore). Metal and mining counters would be in focus as COMEX Copper prices hit a five month high yesterday.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(13.8)	130.0	77.5
MF(INR cr)	714.2	(184.5)	(90.0)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	52,169	52,854	52,827
F&O(INR cr)	1,079,855	1,668,626	1,393,646

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.4	31.3	34.4
NSE VIX	29.1	30.2	36.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,370	0.1 %	17.4 %	Energy	14,397	(1.3) %	33.6 %
IT	14,754	(0.1) %	22.5 %	Pharma	9,985	(1.5) %	42.1 %
Metals	1,991	0.1 %	28.2 %	Finance	10,562	0.3 %	18.1 %
Auto	6,719	1.1 %	44.3 %	PSU	1,428	(1.8) %	11.3 %
FMCG	30,063	0.3 %	14.1 %	Real Estate	203	(0.5) %	17.8 %

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>
Bosch	11,418	4.2 %	23.6 %	Adani Tran	260	(3.8) %	37.4 %
ICICI Pru	426	3.8 %	24.3 %	H P C L	217	(3.8) %	17.8 %
ACC	1,332	3.3 %	38.3 %	Cadila Hea	353	(3.7) %	33.8 %
Ambuja Cem	194	3.2 %	23.6 %	Power Fin.	84	(3.6) %	(5.5) %
United Bre	1,038	3.2 %	16.6 %	Bajaj Hold	2,543	(3.0) %	44.9 %

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					

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