



02 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,897	0.7 %	19.9 %
BSE SENSEX	33,304	2.7 %	18.3 %
CNX BANK	19,960	0.0 %	9.6 %
CNX MIDCAP	13,685	0.0 %	19.3 %
CNX SMALLCAP	4,131	0.0 %	16.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,475	0.4 %	(10.7) %
S&P 500	3,056	0.4 %	(5.4) %
FTSE 100	6,166	1.5 %	(18.9) %
HANG SENG	23,733	3.4 %	(16.9) %
NIKKEI	22,062	0.8 %	(4.9) %
SHANGHAI COMPOSITE	2,915	2.2 %	(5.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.08	(0.3) %	5.4 %
EUR/USD	1.11	0.8 %	(0.8) %
GBP/USD	1.24	1.2 %	(5.7) %
USD/JPY	107.63	(0.1) %	(0.9) %
USD/AUD	1.48	(1.8) %	3.8 %
USD/SGD	1.41	(0.7) %	4.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	35	(0.1) %	(42.1) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,752	0.5 %	13.6 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,512	(0.2) %	(14.7) %
Copper(USD/MT)	5,377	0.8 %	(12.8) %

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 Institute for Supply Management or ISM said its purchasing managers index rose to 43.1 in May from 41.5 in April. While the index rebounded from its lowest level since April of 2009, a reading below 50 still indicates a contraction in manufacturing activity. China's official manufacturing Purchasing Managers' Index (PMI) recorded at 50.6 in May. It's the third straight month in which the country has seen factory output rise. China manufacturing sector moved into expansion territory in May, with a manufacturing PMI score of 50.7, the latest survey from Caixin showed on Monday, up from 49.4 in April. It also moves above the boom-or-bust line of 50 that separates expansion from contraction. Individually, the index saw its strongest increase in output since January 2011. Eurozone manufacturing sector downturn eased noticeably in May as companies' restarted work after coronavirus lockdown eased, final data from IHS Markit showed Monday. The manufacturing Purchasing Managers' Index improved to 39.4 in May from April's record low of 33.4. UK manufacturing Purchasing Managers' Index also rose to 40.7 in May from a record-low 32.6 in April, as the public lockdowns, company shutdowns and social distancing measures mandated to combat the spread of coronavirus, or Covid-19, caused further disruption, final data from IHS Markit showed Monday.

Global Equities: US stocks managed to stay supported on continued buying support.

Indian Economy: India's manufacturing activity contracted sharply in May following a record drop in April following the lockdown to control the coronavirus pandemic but saw a month on month increase. The Nikkei Manufacturing Purchasing Managers' Index or PMI compiled by IHS Markit edged up to 30.8 in May from April's record low of 27.4. The current level is far below the 50-mark separating growth from contraction. The survey noted that sub-indexes for new orders and output remained firmly in contraction territory while both input and output prices dropped for a second straight month. The Cabinet Committee on Economic Affairs (CCEA) chaired by the Hon'ble Prime Minister Narendra Modi has approved the increase in the Minimum Support Prices (MSPs) for all mandated Kharif crops for marketing season 2020-21. Government has increased the MSP of Kharif crops for marketing season 2020-21, to ensure remunerative prices to the growers for their produce.

Equity Markets: Domestic shares ended with robust gains on Monday, rising for fourth straight session. Easing of lockdown, better-than-expected GDP numbers and positive global cues boosted market sentiment. The barometer S&P BSE Sensex jumped 879.42 points or 2.71% at 33,303.52. The Nifty 50 index gained 245.85 points or 2.57% at 9,826.15.

Corporate News: Hero MotoCorp dispatched 112,682 units of two-wheelers in the month of May 2020 as compared to 652,028 units in May 2019. Ensuring stringent safety protocols for employee and customer wellbeing, Hero MotoCorp scaled-up production in a graded manner during the month, after reopening three of its manufacturing facilities on May 4. NTPC has incorporated a joint venture company with East Delhi Municipal Corporation (EDMC) with equity participation of 74:26 respectively, in the name of 'NTPC EDMC Waste Solutions Private Limited' with the Registrar of Companies, NCT of Delhi & Haryana on 1 June 2020, to develop & operate integrated waste management & energy generation facility. Tata Power Company has yesterday acquired 51% equity stake in TP Central Odisha Distribution Limited (TPCODL) at a consideration of Rs 178.5 crore. GRIDCO Limited will hold balance 49% equity stake on TPCODL.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	159.3	95.5	48.2
MF(INR cr)	141.1	268.9	(77.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	66,114	66,114	53,160
F&O(INR cr)	1,100,322	1,100,322	1,226,727

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.5	0	36.1
NSE VIX	30.7	30.7	40.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,960	3.4 %	9.6 %	Energy	13,346	2.2 %	23.9 %
IT	14,307	2.1 %	18.8 %	Pharma	9,802	0.3 %	39.5 %
Metals	1,953	3.9 %	25.7 %	Finance	9,874	3.6 %	10.4 %
Auto	6,420	3.2 %	37.8 %	PSU	1,215	7.6 %	(5.3) %
FMCG	29,571	0.9 %	12.2 %	Real Estate	186	3.1 %	7.8 %

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>
Piramal En	1,111	14.9 %	18.7 %	New India	117	(3.1) %	10.9 %
Bajaj Fin.	2,161	10.6 %	(2.6) %	Dr Reddy's	3,954	(2.9) %	27.7 %
Ashok Leyl	46	9.3 %	12.9 %	Aurobindo	726	(2.7) %	85.0 %
Punjab Nat	29	9.2 %	(4.1) %	Bharti Inf	224	(2.5) %	44.6 %
Bank of Ba	42	9.0 %	(17.2) %	Petronet L	246	(2.5) %	23.2 %

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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