



02 Jun.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,575	(0.1) %	4.8 %
BSE SENSEX	51,935	(0.0) %	3.8 %
CNX BANK	35,337	(0.5) %	4.4 %
CNX MIDCAP	25,750	(0.1) %	6.8 %
CNX SMALLCAP	9,207	(0.6) %	11.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,575	0.1 %	13.0 %
S&P 500	4,202	(0.1) %	11.9 %
FTSE 100	7,080	0.8 %	7.7 %
HANG SENG	29,468	1.1 %	7.3 %
NIKKEI	28,814	(0.2) %	5.7 %
SHANGHAI COMPOSITE	3,625	0.3 %	3.5 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.44	(0.2) %	(0.7) %
EUR/USD	1.22	0.1 %	(0.5) %
GBP/USD	1.42	0.3 %	4.0 %
USD/JPY	109.64	0.2 %	6.3 %
USD/AUD	1.29	0.1 %	(0.3) %
USD/SGD	1.32	(0.2) %	0.0 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(0.8) %	39.3 %
Gold(INR/10g)	49,173	0.5 %	(3.6) %
Gold Comex(USD/oz)	1,917	0.4 %	(1.7) %
SILVER(INR/1Kg)	72,340	1.2 %	5.1 %
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:** Manufacturing activity in the US expanded at a slightly faster pace in the month of May, according to a report released by the Institute for Supply Management on Tuesday. The ISM said its manufacturing PMI inched up to 61.2 in May from 60.7 in April, with a reading above 50 indicating growth in the manufacturing sector. The US Commerce Department said construction spending edged up by 0.2% to an annual rate of \$1.524 trillion in April after jumping by 1% to an upwardly revised rate of \$1.521 trillion in March. China's Manufacturing Purchasing Managers' Index (PMI) rose to 52.0 last month, the highest level since December and inching up from April's 51.9, a Caixin/Markit survey showed on Tuesday. Activity picked up at the fastest pace this year in May as domestic and export demand picked up, though sharp rises in raw material prices and strains in supply chains crimped some companies' production. Eurozone final Manufacturing Purchasing Managers' Index (PMI) rose to 63.1 in May from April's 62.9, the highest reading since the survey began in June 1997, according to a survey on Tuesday. Output growth was the slowest in three months, though it remained close to March's record with production again underpinned by rapid gains in new orders. Eurozone consumer price inflation rose for a third straight month in May, preliminary figures from Eurostat showed Tuesday. The flash consumer price inflation climbed to 2% from 1.6% in April. Core inflation, which excludes prices of energy, fresh food, alcohol and tobacco, also accelerated to 0.9% from 0.7% in April. UK manufacturing purchasing managers' index climbed to 65.6 in May from 60.9 in April, survey data from CIPS and IHS Markit showed Tuesday. A PMI reading above 50 signals growth in the manufacturing sector. The latest reading surpassed July 1994's previous record high of 61.0. The UK manufacturing sector has expanded in each of the past 12 months.

**Global Equities:** The US stocks stayed largely supported on firm manufacturing cues and generally sound risk sentiments.

**Indian Economy:** Indian Railways' Freight made the highest ever loading of 114.8 Metric Tonne (MT) for the month of May and earned Rs 11604.94 crores from freight loading. The 75% peak trading margin norm by the Securities and Exchange Board of India (Sebi) came into effect from Tuesday. This is the third phase of implementing higher margin on day trading. The peak margin trading will be eventually raised to 100% by September.

**Equity Markets:** The domestic equity benchmarks ended almost flat after a volatile session on Tuesday. While selling was wide spread, most IT and pharma stocks managed to end in the green. The broader market traded lower. The S&P BSE Mid-Cap index rose 0.01%. The S&P BSE Small-Cap index fell 0.31%.

**Corporate News:** ITC reported standalone profit at Rs 3,748.4 crore for Q4FY21 against Rs 3,797 crore in Q4FY20. Revenue jumped to Rs 13,294.66 crore from Rs 10,842.28 crore in the year-ago period. Coal India Ltd on Tuesday said its coal offtake rose by 38% to 55 million tonnes (MT) in May on the back of revival of fuel demand from the power sector. IT counter could be in focus following a slide in the Indian Rupee. The INR closed at 72.90 per US dollar, falling 28 paise on the day. The currency has seen sustained losses this week after hitting a two month high. Hero MotoCorp sold 1,83,044 units of two-wheelers in May 2021, against 1,12,682 units sold in May 2020.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	712.0	39.4	(20.6)
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)	68,710	68,710	73,935
F&O(INR cr)	3,932,626	3,932,626	4,480,523

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.7	19.7	18.6
NSE VIX	17.4	17.4	20.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,337	(0.5) %	4.4 %	Energy	19,977	0.3 %	7.9 %
IT	27,144	0.1 %	4.5 %	Pharma	14,058	0.0 %	13.6 %
Metals	5,122	(0.8) %	22.3 %	Finance	16,646	(0.1) %	4.6 %
Auto	10,458	(0.3) %	4.3 %	PSU	2,412	(0.6) %	8.9 %
FMCG	35,241	(0.0) %	1.1 %	Real Estate	334	(0.5) %	(0.4) %

### 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>
Adani Ente	1,416	7.6 %	27.9 %	Aurobindo	970	(2.8) %	10.1 %
Alkem Lab	3,102	3.8 %	11.8 %	JSW Steel	695	(2.3) %	36.5 %
Adani Port	798	3.7 %	8.4 %	Tata Steel	1,101	(2.2) %	27.6 %
O N G C	118	3.5 %	12.7 %	Vedanta	268	(2.2) %	16.0 %
Bajaj Fina	5,785	2.8 %	9.7 %	ICICI Bank	650	(1.9) %	9.4 %

### 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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