



03 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,923	(0.2) %	2.2 %
BSE SENSEX	39,714	(0.3) %	2.2 %
CNX BANK	31,375	(0.5) %	3.5 %
CNX MIDCAP	17,959	(0.2) %	(2.0) %
CNX SMALLCAP	6,548	(1.2) %	(2.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,815	(1.4) %	6.4 %
S&P 500	2,752	(1.3) %	9.8 %
FTSE 100	7,162	(0.8) %	6.3 %
HANG SENG	26,901	(0.8) %	7.0 %
NIKKEI	20,601	(1.6) %	5.3 %
SHANGHAI COMPOSITE	2,899	(0.2) %	17.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.69	(0.1) %	0.4 %
EUR/USD	1.11	(0.1) %	(2.8) %
GBP/USD	1.26	(0.2) %	(1.0) %
USD/JPY	109.66	0.2 %	0.0 %
USD/AUD	1.45	0.0 %	1.7 %
USD/SGD	1.38	(0.2) %	1.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	(5.5) %	15.0 %
Gold(INR/10g)	32,056	1.2 %	1.7 %
Gold Comex(USD/oz)	1,306	1.2 %	1.2 %
SILVER(INR/1Kg)	36,357	0.7 %	(5.0) %
Aluminium(USD/MT)	1,761	(0.1) %	(5.2) %
Copper(USD/MT)	5,781	(0.7) %	(1.0) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	(0.1) %	(0.5) %

Global Economy: The University of Michigan released a report on Friday showing a bigger than expected downward revision to its reading on US consumer sentiment in the month of May. The report said the consumer sentiment index for May was downwardly revised to 100.0 from the preliminary reading of 120.4. Growth in Chicago-area business activity reaccelerated in the month of May after slowing over the two previous months, MNI Indicators revealed in a report released on Friday. MNI Indicators said its Chicago business barometer rose to 54.2 in May after falling to a two-year low of 52.6 in April. China's manufacturing activity declined in May for the first time in three months as new orders, employment and inventories shrunk. The official Purchasing Managers Index, or PMI, for the manufacturing sector eased to 49.4 from 50.1 in April, survey data from the National Bureau of Statistics showed on Friday. German consumer price index rose 1.4% year-on-year in May after a 2% increase in April, which was the fastest in five months. German retail sales rebounded at 4% annually in April, reversing a 2% fall in March.

Global Equities: US stocks tumbled as President Donald Trump revealed plans to use tariffs to compel Mexico to make efforts to stop the flow of illegal immigrants across the country and into the US. Dow dropped to a four-month closing low, shedding 1.4% on the day.

Indian Economy: India's economic growth rate slowed to five-year low of 5.8% in January-March 2018-19, due to slackness in agriculture and manufacturing sectors, official data stated. The Central Statistics Office also revealed that GDP growth during the 2018-19 fiscal stood at 6.8%, lower than 7.2% in the previous financial year. According to Finance Ministry data, total gross GST revenue collected in the month of May, 2019 is Rs 1,00,289 crore. This is third consecutive month of ?1 lakh crore plus mobilization. However, collection in May was lower than all-time high of April.

Equity Markets: Key equity indices ended with modest losses as investors booked profits after the Narendra Modi government announced the allocation of the Cabinet portfolios. Sentiment was also impacted by negative global cues. However, steep slide in crude global oil prices cushioned losses. The Sensex fell 117.77 points or 0.30% to settle at 39,714.20. The Nifty 50 index fell 23.10 points or 0.19% to settle at 11,922.80.

Corporate News: Reliance Industries Ltd (RIL) has resumed lobbying among US lawmakers through a new lobbyist for advocating its position on the US economic trade sanctions policies. The India Met Department (IMD) has retained the 'normal' monsoon outlook (96- to 104% of the long-period average, LPA) for this year and reaffirmed the onset date as June 6 along the Kerala coast. Top automaker Maruti Suzuki reported a 22% decline in sales in May, its sharpest fall since August 2012. This is the third consecutive month that the company's sales have dropped. Dilip Buildcon executed an EPC agreement with the National Highways Authority of India for Saoner-Dhapewada-Kalmeshwar-Gondkhairi, NH-547E, Package -II on EPC mode in Maharashtra. NTPC said that Unit-1 of 800 MW of Gadarwara Super Thermal Power Station (2 x 800 MW) has started its commercial operation. With this, the commercial capacity of Gadarwara Super Thermal Power Station, NTPC and NTPC group has become 800 MW, 46,525 MW and 54,326 MW, respectively.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	297.0	61.0	105.1
MF(INR cr)	(1,405.4)	244.4	13.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	45,086	35,641	35,347
F&O(INR cr)	868,179	1,161,203	1,173,213

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.7	16.8	14.9
NSE VIX	16.1	23.2	22.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,375	(0.5) %	3.5 %	Energy	16,560	0.2 %	0.2 %
IT	16,161	1.0 %	2.0 %	Pharma	8,455	(0.2) %	(9.8) %
Metals	2,900	(0.8) %	(6.5) %	Finance	13,480	(0.3) %	7.8 %
Auto	8,176	(0.7) %	(2.8) %	PSU	3,248	(1.3) %	(4.1) %
FMCG	29,850	(0.5) %	(1.1) %	Real Estate	284	(0.2) %	6.3 %

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	14	4.9 %	(21.4) %	Yes Bank	148	(4.6) %	(46.4) %
Godrej Con	688	4.5 %	1.6 %	ITC	279	(3.5) %	(6.3) %
Havells In	748	3.8 %	(3.6) %	Cadila Hea	248	(3.4) %	(28.0) %
Tech Mahin	760	3.4 %	(3.2) %	Grasim Ind	886	(2.8) %	3.4 %
Shriram Tr	1,164	3.2 %	(5.8) %	M & M	647	(2.2) %	(2.1) %

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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