



03 Jun.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,576	0.0 %	4.8 %
BSE SENSEX	51,849	(0.2) %	3.6 %
CNX BANK	35,374	0.1 %	4.5 %
CNX MIDCAP	26,118	1.4 %	8.3 %
CNX SMALLCAP	9,328	1.3 %	12.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,600	0.1 %	13.0 %
S&P 500	4,208	0.1 %	12.0 %
FTSE 100	7,108	0.4 %	8.2 %
HANG SENG	29,298	(0.6) %	6.6 %
NIKKEI	28,946	0.5 %	6.2 %
SHANGHAI COMPOSITE	3,597	(0.8) %	2.7 %

**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	0.1 %	4.0 %
USD/JPY	109.64	(0.3) %	6.3 %
USD/AUD	1.29	(0.3) %	(0.3) %
USD/SGD	1.32	(0.1) %	0.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	2.1 %	42.2 %
Gold(INR/10g)	49,049	(0.3) %	(3.8) %
Gold Comex(USD/oz)	1,905	(0.6) %	(2.3) %
SILVER(INR/1Kg)	71,239	(1.5) %	3.5 %
Aluminium(USD/MT)	2,462	2.4 %	22.2 %
Copper(USD/MT)	10,213	0.5 %	29.0 %

**FIXED INCOME**

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

**Global Economy:** The International Labour Organisation said the global unemployment rate will be 5.7% in 2022 with estimated 205 million unemployed people around the world, which will continue to be higher than the pre Covid numbers of 187 million in 2019. Federal Reserve's Beige Book said that the US economy increased at a somewhat faster rate from early April to late May. The Beige Book said the effects of expanded vaccination rates were most notable in consumer spending, as increased leisure travel and restaurant spending augmented ongoing strength in other spending categories. However, several districts also noted the adverse impacts of supply chain disruptions, with manufacturers reporting that widespread shortages of materials and labor along with delivery delays made it difficult to get products to customers. Germany's retail sales dropped in April, data released by Destatis revealed on Wednesday. The retail sales declined 5.5% on a monthly basis, reversing March's 7.7% gain. On a yearly basis, growth in retail sales slowed to 4.4% from 11.6% in March. In nominal terms, retail sales decreased 5.4% on month, while turnover advanced 5.8% annually in April. UK mortgage approvals increased more than expected in April, figures from Bank of England showed on Wednesday. The number of mortgages approved for house purchase rose moderately to 86,921 in April from 83,402 in March. South Korea's consumer inflation accelerated to a more than nine-year high in May. Consumer prices rose 2.6% in May from a year earlier, government data showed on Wednesday, logging the fastest growth since April 2012. It grew 2.3% in April.

**Global Equities:** The US stocks saw choppy moves as some selling was seen in the tech counters.

**Indian Economy:** India's merchandise exports in May 2021 was USD 32.21 billion, an increase of 67.39% over USD 19.24 billion in May 2020 and an increase of 7.93% over USD 29.85 billion in May 2019. India's merchandise exports in Apr-May 2021 was USD 62.84 billion, an increase of 112.29% over USD 29.6 billion in Apr-May 2020 and an increase of 12.44% over USD 55.88 billion in Apr-May 2019. India's merchandise imports in May 2021 was USD 38.53 billion, an increase of 68.54% over USD 22.86 billion in May 2020 and a decline of 17.47% over USD 46.68 billion in May 2019. India's merchandise imports in Apr-May 2021 was USD 84.25 billion, an increase of 110.73% over USD 39.98 billion in Apr-May 2020 and a decrease of 5.41% over USD 89.07 billion in Apr-May 2019.

**Equity Markets:** The key equity indices ended with minor cuts on Wednesday. After recording heavy losses in the afternoon trade, the benchmarks sharply pared losses in late trade. PSU banks and metal shares rallied while IT and FMCG shares declined.

**Corporate News:** Reliance Industries (RIL) noted in its latest Annual Report that strong operating cash flow and largest ever capital raise further strengthened its balance sheet, enabling it to deleverage and meet our net-debt zero commitment ahead of stated timeline. Muthoot Finance reported higher consolidated profit at Rs 1,023.76 crore in Q4FY21 against Rs 835.77 crore in Q4FY20. Its total revenue increased to Rs 3,104.5 crore from Rs 2,630.5 crore YoY. Rossari Biotech will acquire Unitop Chemicals, a leading supplier of surfactants, emulsifiers and specialty chemicals, for Rs 421 crore.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	72.0	72.0	(18.1)
MF(INR cr)	61.6	61.6	138.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	79,805	74,258	74,081
F&O(INR cr)	4,328,023	4,130,325	4,476,804

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.8	16.8	18.5
NSE VIX	17.2	17.3	20.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,374	0.1 %	4.5 %	Energy	20,224	1.2 %	9.2 %
IT	26,940	(0.8) %	3.7 %	Pharma	14,152	0.7 %	14.3 %
Metals	5,233	2.2 %	24.9 %	Finance	16,621	(0.1) %	4.5 %
Auto	10,648	1.8 %	6.2 %	PSU	2,486	3.0 %	12.2 %
FMCG	35,059	(0.5) %	0.5 %	Real Estate	339	1.5 %	1.0 %

### 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>
Motherson	269	13.4 %	27.9 %	ITC	209	(2.9) %	(5.0) %
Adani Ente	1,547	9.2 %	39.7 %	L & T Info	3,838	(1.3) %	(6.7) %
Muthoot Fi	1,415	8.1 %	16.5 %	Tech Mahin	1,017	(1.3) %	2.5 %
Punjab Nat	44	5.6 %	15.2 %	Axis Bank	737	(1.1) %	3.4 %
Adani Tran	1,558	3.9 %	55.9 %	GAIL (Indi	159	(1.0) %	13.3 %

### 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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