



04 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,860	3.2 %	19.5 %
BSE SENSEX	33,718	3.0 %	19.3 %
CNX BANK	21,535	2.1 %	18.3 %
CNX MIDCAP	13,502	2.1 %	17.7 %
CNX SMALLCAP	4,078	0.7 %	15.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,724	(2.6) %	(16.9) %
S&P 500	2,831	(2.8) %	(12.4) %
FTSE 100	5,763	(2.3) %	(24.2) %
HANG SENG	24,644	0.3 %	(13.7) %
NIKKEI	19,619	(2.8) %	(15.5) %
SHANGHAI COMPOSITE	2,860	1.3 %	(7.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.33	(0.6) %	4.4 %
EUR/USD	1.09	0.4 %	(2.8) %
GBP/USD	1.25	0.6 %	(5.0) %
USD/JPY	106.82	0.2 %	(1.7) %
USD/AUD	1.53	0.0 %	7.4 %
USD/SGD	1.41	(0.2) %	4.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	20	5.0 %	(67.7) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,700	(1.8) %	10.2 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,440	(1.4) %	(18.7) %
Copper(USD/MT)	5,061	(3.2) %	(17.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.6	(0.0) %	(1.3) %

Global Economy: The Institute for Supply Management (ISM) said its purchasing managers index (PMI) slumped to 41.5 in April from 49.1 in March, with a reading below 50 indicating a contraction in manufacturing activity. With the tumble, the PMI dropped to its lowest level since hitting 39.9 in April of 2009. The Commerce Department said construction spending climbed by 0.9% to an annual rate of \$1.361 trillion in March after tumbling by 2.5% to a revised \$1.348 trillion in February. China manufacturing sector continued to expand in April, although at a slower pace, the latest survey from the National Bureau of Statistics said on Thursday with a manufacturing PMI score of 50.8. That was down from 52.0 in March. European Central Bank (ECB) left interest rates unchanged at historical lows today, while further easing conditions for its existing targeted long-term refinancing operations, or TLTROs, and introducing a new program of non-targeted pandemic emergency longer-term refinancing operations, or PELTROs. The ECB made no changes to the size of its 750 billion euro pandemic emergency purchase program, or PEPP. The euro area real GDP could remain well below the level seen at the end of 2019 until the end of 2022 under severe situation, the European Central Bank reported Friday. UK manufacturing activity contracted the most on record as the outbreak of covid-19, pandemic caused substantial disruptions in the sector, final survey data from IHS Markit and Chartered Institute of Procurement & Supply showed Friday. The manufacturing PMI fell to 32.6 in April from 47.8 in March.

Global Equities: US stocks continued to ease from one month high as tepid earnings and lack of fresh buying hurt the sentiments.

Indian Economy: Centre has extended the nationwide lockdown, put in to contain the Covid-19 outbreak, by two more weeks to May 17. The extension will however see some relaxations which will be regulated based on the spread of the virus in the districts, identified as red (hotspot), green and orange zones. India's core sector output contracted 6.5% in March, witnessing the worst performance by the key infrastructure areas going back to 2005. The contraction is a sharp reversal from 7.2% growth in February, an 11-month high, data released by the commerce department on Thursday showed. For the full year, infrastructure industries rose just 0.6% against 4.4% last year.

Equity Markets: Domestic shares extended gains for the fourth straight session on Thursday, tracking positive global cues. The barometer S&P BSE Sensex gained 997.46 points or 3.05% at 33,717.62. The Nifty 50 index added 306.55 points or 3.21% at 9,859.90. Trading was volatile on account of the monthly F&O expiry today. Index heavyweight Reliance Industries (RIL) advanced ahead of Q4 results.

Corporate News: Reliance Industries (RIL) on Thursday reported a 38.73% year-on-year (YoY) fall in consolidated net profit at Rs 6,348 crore in March quarter (Q4). For the financial year ended March 31, net profit fell marginally by 0.59% YoY to Rs 39,354 crore. Consolidated revenue of the company declined 2.50% YoY to Rs 1.51 lakh crore. ICICI Lombard General Insurance recorded a 23.8% year-on-year (YoY) rise in its March quarter (Q4) net profit at Rs 281.93 crore due to a reduction in underwriting losses. Coal India reported an 11% decline in production to 40.38 million tonnes in April. It had posted a total production of 45.30 million tonne (MT) in the corresponding month of the previous financial year.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	103.7	(25.0)	(25.0)
MF(INR cr)	66.7	(345.7)	(345.7)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	65,595	49,361	49,361
F&O(INR cr)	2,671,408	1,149,077	1,149,077

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	37.2	37.2	41.1
NSE VIX	34.0	45.0	45.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,535	2.1 %	18.3 %	Energy	13,155	4.3 %	22.1 %
IT	14,108	5.1 %	17.1 %	Pharma	9,327	(0.6) %	32.7 %
Metals	1,860	7.9 %	19.7 %	Finance	10,571	2.7 %	18.2 %
Auto	5,901	6.5 %	26.7 %	PSU	1,326	0.8 %	3.3 %
FMCG	28,669	0.0 %	8.8 %	Real Estate	187	2.3 %	8.8 %

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>
Tata Motor	93	19.3 %	37.2 %	Sun Pharma	464	(2.8) %	35.2 %
UPL	420	16.5 %	37.4 %	Lupin	835	(2.2) %	44.3 %
Tata Motor	40	13.9 %	32.7 %	Berger Pai	508	(1.7) %	5.2 %
O N G C	80	13.3 %	21.5 %	Hind. Unil	2,195	(1.6) %	0.7 %
Vedanta	90	13.1 %	42.9 %	Oracle Fin	2,347	(1.6) %	22.2 %

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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