



04 Jun.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,062	0.0 %	21.9 %
BSE SENSEX	34,110	0.8 %	20.7 %
CNX BANK	20,941	0.0 %	15.0 %
CNX MIDCAP	13,924	0.0 %	21.4 %
CNX SMALLCAP	4,278	0.0 %	20.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,270	2.0 %	(7.9) %
S&P 500	3,123	1.4 %	(3.3) %
FTSE 100	6,382	2.6 %	(16.1) %
HANG SENG	24,326	1.4 %	(14.8) %
NIKKEI	22,614	1.3 %	(2.5) %
SHANGHAI COMPOSITE	2,923	0.1 %	(5.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.94	(0.2) %	5.3 %
EUR/USD	1.12	0.8 %	0.0 %
GBP/USD	1.26	1.2 %	(4.6) %
USD/JPY	108.76	1.1 %	0.1 %
USD/AUD	1.44	(2.4) %	1.3 %
USD/SGD	1.40	(0.8) %	3.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	3.9 %	(39.8) %
Gold(INR/10g)	46,609	13.7 %	19.5 %
Gold Comex(USD/oz)	1,733	(1.1) %	12.3 %
SILVER(INR/1Kg)	48,314	31.0 %	4.9 %
Aluminium(USD/MT)	1,500	(0.8) %	(15.4) %
Copper(USD/MT)	5,463	1.6 %	(11.4) %

**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	0.1 %	(1.2) %

**Global Economy:** The US ISM said its non-manufacturing index rebounded to 45.4 in May after plunging to an eleven-year low of 41.8 in April. The increase by the headline index was partly led by a substantial rebound by the business activity index, which spiked to 41.0 in May from 26.0 in April. The new orders index also jumped to 41.9 in May from 32.9 in April, while the employment index rose to 31.8 from 30.0. The Eurozone private sector contracted sharply in May though it improved from April as lockdown restrictions implemented to prevent the spread of coronavirus loosened in many economies, survey results from IHS Markit showed. The final composite output index rose to 31.9 in May from April's record low of 13.6. The score was above the flash reading of 30.5. A score below 50 indicates contraction in the private sector. Respondents noted that containment measures continued to have a severe impact on economic performance. New business continued to fall markedly in May and companies reduced their employment. The latest survey from Caixin recorded a services PMI score of 55 for China, rising from 44.4 in April and moving above the boom-or-bust line of 50 that separates expansion from contraction. Individually, business activity and new work rose at the quickest rates since 2010. The pandemic continued to weigh heavily on export orders, and employment fell slightly as firms looked to raise efficiency. The survey also showed that its composite index jumped to 54.5 in May, up from 47.6 in the previous month.

**Global Equities:** US stocks moved up solidly on consistent buying support. DOW broke above 26000 mark to hit around three month high.

**Indian Economy:** Business activity across India's service sector fell drastically during May as the unfavourable economic effects of the coronavirus disease 2019 (COVID-19) pandemic impaired business operations, restricted consumer footfall and led demand to collapse. While most measures came off the unprecedented lows seen in April, survey data still pointed to extreme month-to-month declines in output and new orders. The IHS Markit India Services Business Activity Index recorded 12.6 in May. Although the headline figure rose from April's unprecedented low of 5.4, it remained at a level which, prior to the coronavirus pandemic, was unparalleled in over 14 years of data collection and pointed to an extreme drop in services activity across India. The Composite PMI Output Index, which measures combined services and manufacturing output, signalled a further severe contraction in private sector business activity during May. Posting 14.8, from 7.2 in April, the latest reading was consistent with a further decline in output.

**Equity Markets:** Domestic shares extended their winning streak to sixth straight session on Wednesday. Global cues were supportive as hopes of more stimulus and further easing in social restrictions around the world surpassed coronavirus fears. The barometer S&P BSE Sensex jumped 284.01 points or 0.84% at 34,109.54. The Nifty 50 index soared 82.45 points or 0.83% at 10,061.55. Both these indices rose over 11% in last six trading sessions.

**Corporate News:** Punjab National Bank lowered interest rate on savings account deposits by 0.50 percentage point, effective July 1. For deposits up to Rs 50 lakh, the new interest rate will be 3% now. Reliance Industries Ltd' Rs 53,124 crore rights issue, which closed on Wednesday, saw a robust response from shareholders as the issue got subscribed 1.59 times. The allotment of equity shares will happen on June 10. Aurobindo Pharma Limited's consolidated net profit after JV share and minority interest was up by 45.2% to Rs 849.8 crore for the quarter ended March 31, 2020 against Rs 585.4 crore during the same quarter in FY19.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1,043.9	981.2	98.7
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)	70,102	69,005	54,025
F&O(INR cr)	1,725,771	1,335,096	1,238,015

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.8	26.8	35.9
NSE VIX	30.0	30.3	40.0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,941	2.0 %	15.0 %	Energy	13,520	0.3 %	25.5 %
IT	14,362	(0.4) %	19.2 %	Pharma	9,864	0.3 %	40.4 %
Metals	1,953	(0.2) %	25.7 %	Finance	10,385	1.9 %	16.1 %
Auto	6,499	0.4 %	39.5 %	PSU	1,284	5.1 %	0.1 %
FMCG	29,527	0.6 %	12.0 %	Real Estate	201	3.1 %	16.7 %

### 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>
Interglobe	1,023	8.2 %	2.4 %	Piramal En	1,128	(4.4) %	20.4 %
Shriram Tr	617	5.3 %	(0.8) %	United Bre	936	(3.1) %	5.2 %
Vodafone I	8	5.2 %	165.6 %	Oracle Fin	2,500	(2.9) %	30.1 %
Bosch	11,043	5.2 %	19.6 %	NTPC	95	(2.1) %	16.9 %
M & M	485	4.8 %	77.8 %	Wipro	211	(2.1) %	11.5 %

### 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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