



05 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,294	(5.7) %	12.6 %
BSE SENSEX	31,715	(5.9) %	12.2 %
CNX BANK	19,744	(8.3) %	8.4 %
CNX MIDCAP	12,908	(4.4) %	12.5 %
CNX SMALLCAP	3,946	(3.2) %	11.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,750	0.1 %	(16.8) %
S&P 500	2,843	0.4 %	(12.0) %
FTSE 100	5,754	(0.2) %	(24.3) %
HANG SENG	23,614	(4.2) %	(17.3) %
NIKKEI	19,619	(2.8) %	(15.5) %
SHANGHAI COMPOSITE	2,860	1.3 %	(7.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.00	0.3 %	5.3 %
EUR/USD	1.09	0.6 %	(2.6) %
GBP/USD	1.24	(0.1) %	(5.7) %
USD/JPY	106.78	0.2 %	(1.7) %
USD/AUD	1.56	2.0 %	9.5 %
USD/SGD	1.42	0.3 %	5.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	20	3.1 %	(66.7) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,714	0.8 %	11.1 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,437	(0.2) %	(18.9) %
Copper(USD/MT)	5,058	(0.1) %	(18.0) %

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: New orders for US manufactured goods nosedived by even more than expected in the month of March, according to a report released by the Commerce Department on Monday. The report said factory orders plummeted by 10.3% in March after edging down by a revised 0.1% in February. Eurozone investor confidence rose marginally in May suggesting the beginning of a stabilization phase after undergoing a breath-taking crash due to coronavirus, covid-19 pandemic, survey data from the behavioral research firm Sentix showed Monday. The headline Sentix investor confidence index rose to -41.8 in May from -42.9 in the previous month. Hong Kong economy contracted the most on record since 1974 in the first quarter. GDP decreased 8.9% in the first quarter from a year earlier.

Global Equities: US stocks saw cautious moves amid concerns about rising tensions between the US and China. Heavy losses were seen in European markets.

Indian Economy: The India Manufacturing Purchasing Managers' Index (PMI) compiled by IHS Markit, tanked to 27.4 in April from 51.8 in March on a seasonally adjusted basis, according to data released on Monday. A reading of less than 50 indicates contraction in business activity. This tumble indicates the sharpest contraction in manufacturing conditions since data collection began over 15 years. Deteriorating demand conditions saw manufacturers drastically cut back staff numbers in April. The reduction in employment was also the steepest in the survey's history. The input costs and output prices expectations were lowered markedly as suppliers and manufacturers themselves offered discounts in an attempt to secure orders. The country-wide lockdown imposed on 23rd March, while necessary, has had deep ramifications on economic activity. According to the CII CEOs Snap Poll on Impact of COVID-19 on Economy and Industry, while a majority of the firms continue to anticipate a significant decline in their topline, they now foresee a delay in economic revival and demand recovery.

Equity Markets: Domestic shares ended with steep losses on Monday, snapping its four-day rising streak. Selling was broad based with banks and metal stocks correcting the most. Liquor stocks spurted after the government allowed reopening of wine shops with strict social distancing norms. According to provisional closing data, the barometer S&P BSE Sensex tumbled 1952.22 points or 5.79% at 31,765.40. The Nifty 50 index lost 558.40 points or 5.66% at 9,301.50.

Corporate News: Marico saw 50.6% year-on-year fall in consolidated profit to Rs 199 crore, impacted by a coronavirus-led shutdown of operations in the last week of March. Consolidated revenue from operations in Q4FY20 dropped 7 percent to Rs 1,496 crore compared to the same quarter previous fiscal, with volume degrowth of 3% in domestic business. Lupin announced positive topline result from Phase 3 study of Single-Dose Solosec for trichomoniasis treatment. Automotive Axles resumed operations of factories and offices at Mysuru and Rudrapur.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	369.1	(1.8)	(1.8)
MF(INR cr)	(412.6)	(402.7)	(402.7)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	50,775	50,775	49,436
F&O(INR cr)	707,389	707,389	1,125,830

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	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	19,744	(8.3) %	8.4 %	Energy	12,727	(3.3) %	18.1 %
IT	13,454	(4.6) %	11.7 %	Pharma	9,365	0.4 %	33.3 %
Metals	1,714	(7.9) %	10.3 %	Finance	9,680	(8.4) %	8.2 %
Auto	5,476	(7.2) %	17.6 %	PSU	1,246	(6.0) %	(2.9) %
FMCG	27,599	(3.7) %	4.7 %	Real Estate	174	(6.9) %	1.3 %

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>
Aurobindo	653	4.4 %	66.5 %	Motherson	77	(12.5) %	32.2 %
Cipla	612	3.8 %	47.9 %	L&T Fin.Ho	58	(11.6) %	14.7 %
Bharti Air	533	3.5 %	26.4 %	ICICI Bank	338	(11.1) %	8.6 %
United Bre	970	3.3 %	9.0 %	Hindalco I	116	(11.0) %	26.5 %
Cadila Hea	330	1.9 %	25.1 %	Vedanta	80	(10.7) %	27.6 %

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					

..... End of Report