



05 Jun.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,115	0.9 %	22.5 %
BSE SENSEX	33,981	(0.4) %	21.1 %
CNX BANK	20,390	0.0 %	12.0 %
CNX MIDCAP	13,913	0.0 %	21.3 %
CNX SMALLCAP	4,279	0.0 %	20.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,282	0.1 %	(7.9) %
S&P 500	3,112	(0.3) %	(3.7) %
FTSE 100	6,341	(0.6) %	(16.6) %
HANG SENG	24,366	0.2 %	(14.6) %
NIKKEI	22,696	0.4 %	(2.2) %
SHANGHAI COMPOSITE	2,919	(0.1) %	(5.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.12	0.3 %	5.5 %
EUR/USD	1.13	1.0 %	0.5 %
GBP/USD	1.26	0.2 %	(4.7) %
USD/JPY	109.00	0.8 %	0.3 %
USD/AUD	1.45	(1.0) %	1.4 %
USD/SGD	1.40	(0.2) %	4.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	0.3 %	(38.9) %
Gold(INR/10g)	46,640	0.1 %	19.6 %
Gold Comex(USD/oz)	1,719	0.7 %	11.4 %
SILVER(INR/1Kg)	48,016	(0.6) %	4.3 %
Aluminium(USD/MT)	1,535	0.6 %	(13.4) %
Copper(USD/MT)	5,453	(0.8) %	(11.6) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.8	0.1 %	(1.1) %

**Global Economy:** The US initial jobless claims came in at 1.877 million, a decrease of 249,000 from the previous week's revised level of 2.126 million. The US Commerce Department said the trade deficit widened to \$49.4 billion in April from a revised \$42.3 billion in March. The value of exports tanked by 20.5% to \$151.3 billion while the value of imports tumbled by 13.7% to \$200.7 billion. The European Central Bank announced Thursday it will increase its Pandemic Emergency Purchase Programme by 600 billion euros to bolster the economy following the coronavirus crisis. This followed the billion euros of government bond purchases the ECB announced in March. The central bank also said that the duration of the program will be extended from the end of 2020 until June 2021, or until the bank believes the crisis is over. The central bank kept its key interest rates unchanged as the interest rate on the main refinancing operations remained at 0%, while the rates on the marginal lending facility and the deposit facility stood at 0.25% and -0.5%, respectively. Germany's construction sector contracted in May as the coronavirus, or Covid-19, crisis weighed on new orders and activity, survey results from IHS Markit showed Thursday. The construction Purchasing Managers' Index rose to 40.1 in May from 31.9 in April. UK construction sector downturn eased in May reflecting a gradual reopening of construction sites as lockdown measures introduced to curb the spread of coronavirus, were eased, survey data from IHS Markit showed Thursday. The IHS Markit/Chartered Institute of Procurement & Supply construction Purchasing Managers' Index rose to 28.9 in May from 8.2 in April.

**Global Equities:** US stocks showed some signs of nervousness after recent spurt. Global markets are focusing on the US nonfarm payrolls numbers for May to be released today.

**Indian Economy:** The Reserve Bank released the results of the May 2020 round of its Consumer Confidence Survey (CCS). It noted that Consumer confidence collapsed in May 2020, with the current situation index (CSI) touching historic low and the one year ahead future expectations index (FEI) also recording a sharp fall, entering the zone of pessimism. The Consumer perception on the general economic situation, employment scenario and household income plunged deeper into contraction zone while expectation on general economic situation and employment scenario for the year ahead was also pessimistic. Overall consumer spending remained afloat, mostly due to relative inelasticity in essential spending.

**Equity Markets:** Local stocks ended with small losses on Thursday, snapping a six-day rising streak. Selling in banks stocks put pressure on bourses. Banks corrected after the Supreme Court (SC) raised concerns over levying of interests on loans during the six-month moratorium period. Trading was volatile due to expiry of weekly index options. The barometer S&P BSE Sensex lost 128.84 points or 0.38% at 33,980.70. The Nifty 50 index fell 32.45 points or 0.32% at 10,029.10.

**Corporate News:** Reliance Industries (RIL) and Jio Platforms announced today that Mubadala Investment Company (Mubadala), the Abu Dhabi-based sovereign investor, will invest Rs 9,093.60 crore in Jio Platforms at an equity value of Rs 4.91 lakh crore and an enterprise value of Rs 5.16 lakh crore. HCL Technologies (HCL) and Google Cloud yesterday announced the expansion of their strategic partnership to bring HCL's software offerings, starting with HCL Commerce, to Google Cloud.

State Bank of India (SBI) and Larsen & Toubro (L&T) will declare their Q4 March 2020 results today, 4 June 2020. State-run transmission utility Power Grid on Thursday said the Department of Telecommunication has raised a demand of Rs 13613.66 crore as licence fee for years 2006-07 to 2009-10.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	287.0	749.8	101.0
MF(INR cr)	3,773.0	2,173.7	91.6

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	65,857	68,218	54,313
F&O(INR cr)	2,225,986	1,557,818	1,262,112

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.7	26.3	35.6
NSE VIX	29.7	30.1	39.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,390	(2.6) %	12.0 %	Energy	13,705	1.4 %	27.2 %
IT	14,627	1.9 %	21.4 %	Pharma	10,078	2.2 %	43.4 %
Metals	1,973	1.0 %	27.0 %	Finance	10,111	(2.6) %	13.1 %
Auto	6,511	0.2 %	39.8 %	PSU	1,298	1.0 %	1.2 %
FMCG	29,622	0.3 %	12.4 %	Real Estate	197	(1.7) %	14.7 %

### 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	1,116	9.1 %	11.7 %	Bandhan Ba	233	(6.7) %	19.8 %
Vedanta	104	8.0 %	66.6 %	Asian Pain	1,634	(4.8) %	1.9 %
Vodafone I	9	6.2 %	182.0 %	Bajaj Fin.	2,313	(4.1) %	4.2 %
Tech Mahin	582	5.2 %	13.9 %	Piramal En	1,082	(4.1) %	15.5 %
Zee Entert	206	5.1 %	70.1 %	IndusInd B	415	(4.0) %	21.3 %

### 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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