



06 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,242	0.4 %	12.0 %
BSE SENSEX	31,454	(0.8) %	12.0 %
CNX BANK	19,272	0.0 %	5.8 %
CNX MIDCAP	12,817	0.0 %	11.7 %
CNX SMALLCAP	3,897	0.0 %	10.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,883	0.6 %	(16.3) %
S&P 500	2,868	0.9 %	(11.2) %
FTSE 100	4,849	1.7 %	(36.2) %
HANG SENG	23,869	1.1 %	(16.4) %
NIKKEI	19,619	(2.8) %	(15.5) %
SHANGHAI COMPOSITE	2,860	1.3 %	(7.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.97	0.9 %	5.3 %
EUR/USD	1.09	(0.3) %	(3.1) %
GBP/USD	1.25	(0.5) %	(5.6) %
USD/JPY	106.62	(0.2) %	(1.9) %
USD/AUD	1.55	1.4 %	8.8 %
USD/SGD	1.42	0.3 %	5.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	25	20.5 %	(59.9) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,723	0.5 %	11.7 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,439	0.1 %	(18.8) %
Copper(USD/MT)	5,112	1.1 %	(17.1) %

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	0.0 %	(1.3) %

Global Economy: Institute for Supply Management (ISM) on Tuesday showed US service sector activity contracted for the first time since December of 2009 in the month of April. The ISM said its non-manufacturing index tumbled to 41.8 in April from 52.5 in March, with a reading below 50 indicating a contraction in service sector activity. The US trade deficit widened to \$44.4 billion in March from \$39.8 billion in February. The value of exports plummeted by 9.6% to \$187.7 billion, while the value of imports plummeted by 6.2% to \$232.2 billion. Germany's Constitutional Court largely upheld several complaints against the European Central Bank's purchase of government bonds under a program started in 2015 to prop up the economy and stoke inflation toward the central bank's own target of just below 2%. UK service sector contracted sharply in April as emergency public health measures to stem the coronavirus, or covid-19, pandemic weighed on business activity, final survey data from IHS Markit showed Tuesday. The IHS Markit/Chartered Institute of Procurement & Supply services Purchasing Managers' Index plunged to 13.4 in April from 34.5 in March. The flash reading was 12.3. Prior to the last two months, the survey-record low stood at 40.1 in November 2008. Reserve Bank of Australia kept its interest rate at a record low 0.25% and the targeted yield on three-year government bonds at around 0.25%. The bank said the target will remain in place until progress is being made towards the goals for full employment and inflation.

Global Equities: The US stocks added steady gains on buying in healthcare companies. DOW jumped 1.1% on the day.

Indian Economy: The Central government Tuesday raised excise duties by Rs 10 per litre on petrol and Rs 13 per litre on diesel, which will come into effect from May 6. As per the government notification issued, of the Rs 10 per litre increase in duty on petrol, Rs 8 will be road and infrastructure cess, while Rs 2 will account for special additional excise duty. Similarly, for Rs 13 per litre duty increase in diesel, Rs 8 will be road and infrastructure cess, while Rs 5 will account for special additional excise duty.

Equity Markets: Local market extended its losing run for the second day, led by weakness in banks and FMCG shares. As per provisional closing, the barometer S&P BSE Sensex tumbled 261.84 points or 0.83% at 31,453.51. The Nifty 50 index lost 77.1 points or 0.83% at 9,216.40.

Corporate News: Reliance Industries (RIL) said that the company has elected to redeem, in whole, all outstanding US\$200,000,000 5% Senior Notes Due 2035 along with interest on or around 5 June 2020. Adani Ports and Special Economic Zone (APSEZ) reported 72% fall in consolidated profit after tax to Rs 361 crore on 5% fall in operating revenue to Rs 2921 crore in Q4 March 2020 over Q4 March 2019. In FY21, the company will reduce operating costs and capex will be curtailed to Rs 2000 crore. Ports fall under essential services and as such all ports are operating efficiently during this period of crises to ensure that supply chain of essential goods is not disrupted, the company said. Shares of PSU oil marketing and exploration companies will be in focus after excise duty on petrol and diesel has been hiked by Rs 10 and Rs 13 respectively. This is the steepest such hike in excise duty. Retail fuel prices remain unchanged.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(123.3)	(123.3)	(8.5)
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)	49,426	50,101	49,435
F&O(INR cr)	1,008,240	857,814	1,119,950

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	36.0	36.6	40.9
NSE VIX	43.6	43.6	44.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,272	(2.4) %	5.8 %	Energy	12,898	1.3 %	19.7 %
IT	13,388	(0.5) %	11.1 %	Pharma	9,182	(2.0) %	30.7 %
Metals	1,694	(1.2) %	9.0 %	Finance	9,483	(2.0) %	6.0 %
Auto	5,452	(0.4) %	17.1 %	PSU	1,205	(3.3) %	(6.1) %
FMCG	27,139	(1.7) %	3.0 %	Real Estate	169	(2.9) %	(1.6) %

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>
New India	125	9.9 %	18.4 %	United Spi	495	(8.7) %	6.9 %
Marico	297	4.3 %	11.8 %	United Bre	908	(6.3) %	2.1 %
SBI Life I	714	3.8 %	12.4 %	St Bk of I	170	(4.7) %	(8.7) %
H P C L	215	3.3 %	16.6 %	DLF	127	(4.7) %	(4.3) %
M & M	368	3.1 %	34.9 %	ICICI Pru	375	(4.2) %	9.4 %

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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