



07 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,234	(0.4) %	11.9 %
BSE SENSEX	31,686	0.7 %	12.1 %
CNX BANK	19,536	(0.8) %	7.3 %
CNX MIDCAP	12,874	(0.2) %	12.2 %
CNX SMALLCAP	3,931	0.2 %	11.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,665	(0.9) %	(17.1) %
S&P 500	2,848	(0.7) %	(11.8) %
FTSE 100	5,854	0.1 %	(23.0) %
HANG SENG	24,137	1.1 %	(15.4) %
NIKKEI	19,619	(2.8) %	(15.5) %
SHANGHAI COMPOSITE	2,878	0.6 %	(6.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.17	0.2 %	5.6 %
EUR/USD	1.08	(1.0) %	(3.6) %
GBP/USD	1.24	(0.4) %	(6.1) %
USD/JPY	106.21	(0.5) %	(2.2) %
USD/AUD	1.56	(0.3) %	9.2 %
USD/SGD	1.42	0.1 %	5.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	24	(2.3) %	(60.8) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,704	(1.1) %	10.5 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,443	0.3 %	(18.6) %
Copper(USD/MT)	5,200	1.7 %	(15.7) %

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: US private sector employment nosedived in the month of April, according to a report released by payroll processor ADP on Wednesday. The report said private sector employment plunged by 20.236 million jobs in April after slumping by a revised 149,000 jobs in May. ADP noted the report utilizes data through the 12th of the month, the same as the Labor Department's monthly jobs survey, and does not reflect the full impact of COVID-19 on the overall employment situation. Germany's factory orders fell the most since the records began in 1991, due to the coronavirus pandemic, data published by Destatis revealed Wednesday. Factory orders declined sharply by 15.6% on a monthly basis in March, down sharply than the 1.2% drop in February. This was the biggest fall since January 1991. Australia retail sales spiked a seasonally adjusted 8.5% on month in March, coming in at A\$30.110 billion, the Australian Bureau of Statistics said on Wednesday, following the upwardly revised 0.6% gain in February (originally 0.5%).

Global Equities: US stocks eased on concerns about job scenario. COVID-19 cases also stayed a primary cause of worry.

Indian Economy: India's service sector witnessed its largest month-to-month contractions in business activity since data collection began over 14 years ago in April. The IHS Markit India Services Business Activity Index fell to at 5.4 in April, a steep decline from 49.3 in March, the most severe contraction in services output since records began in December 2005. The global shutdowns as part of the measures undertaken to stem the spread of coronavirus (COVID-19) were among the key factors that led to an unprecedented drop in both the output and demand. Approximately 97% of survey respondents pointed out to a reduction in output, highlighting the widespread impact of the COVID-19 pandemic.

Equity Markets: Key domestic benchmarks snapped two-day losing run and ended with decent gains on bargain hunting. Weak domestic economic data and rising number of COVID-19 cases capped gains. As per provisional closing, the barometer S&P BSE Sensex gained 232.24 points or 0.74% at 31,685.75. The Nifty 50 index gained 65.3 points or 0.71% at 9,270.40.

Corporate News: Maruti Suzuki India would re-start production of vehicles at its Manesar plant from the 12 May 2020. All activities would be carried out strictly in accordance with the Government regulations and guidelines and observing the company's own concern for the highest standards of safety. Shares of Hindustan Unilever (HUL) will be in focus. GlaxoSmithKline Pte and Horlicks reportedly plan to sell 5.69% stake in HUL via block deals at a price band Rs 1,850 - 1,950 per share for \$3.3-3.5 billion. GSK is expected to sell the stake today, 7 May 2020. Tata Consultancy Services (TCS) announced that Continental Bank in the US has selected TCS BaNCS Cloud for banking to digitally transform its business. Dr. Reddy's Laboratories announced approval of ELYXYB (celecoxib oral solution 25 mg/mL) by the U.S. Food and Drug Administration (USFDA). ELYXYB (previously known as DFN-15) is indicated for the acute treatment of migraine with or without aura in adults.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(42.9)	(83.1)	(10.4)
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)	51,620	50,607	49,539
F&O(INR cr)	1,476,310	1,063,980	1,136,920

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.6	35.6	40.6
NSE VIX	41.3	42.4	44.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,695	2.2 %	8.2 %	Energy	12,912	0.1 %	19.9 %
IT	13,395	0.1 %	11.2 %	Pharma	9,227	0.5 %	31.3 %
Metals	1,698	0.3 %	9.3 %	Finance	9,727	2.6 %	8.8 %
Auto	5,552	1.8 %	19.2 %	PSU	1,195	(0.9) %	(6.9) %
FMCG	26,630	(1.9) %	1.0 %	Real Estate	171	1.0 %	(0.6) %

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>
Shriram Tr	781	5.6 %	25.7 %	ITC	164	(5.8) %	(1.5) %
Bandhan Ba	249	5.5 %	27.9 %	Bharti Inf	161	(5.7) %	3.7 %
ICICI Pru	395	5.2 %	15.2 %	H P C L	203	(5.6) %	10.1 %
Bajaj Fin.	2,106	5.2 %	(5.1) %	Bank of Ba	42	(3.9) %	(17.5) %
M & M	387	5.2 %	41.9 %	Coal India	134	(3.1) %	(4.1) %

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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