



08 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,377	1.9 %	13.6 %
BSE SENSEX	31,443	(0.8) %	13.0 %
CNX BANK	19,844	1.8 %	9.0 %
CNX MIDCAP	12,987	1.2 %	13.2 %
CNX SMALLCAP	3,992	1.2 %	12.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,876	0.9 %	(16.3) %
S&P 500	2,881	1.2 %	(10.8) %
FTSE 100	5,936	1.4 %	(21.9) %
HANG SENG	23,981	(0.7) %	(16.0) %
NIKKEI	19,675	0.3 %	(15.2) %
SHANGHAI COMPOSITE	2,872	(0.2) %	(6.9) %

FOREX RATES

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

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	23	(2.3) %	(61.7) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,739	2.1 %	12.8 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,450	0.5 %	(18.2) %
Copper(USD/MT)	5,228	0.5 %	(15.2) %

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	(0.1) %	(1.3) %

Global Economy: First-time claims for U.S. unemployment benefits pulled back further off their recent record high in the week ended May 2nd, according to a report released by the Labor Department on Thursday. The report said initial jobless claims dropped to 3.169 million, a decrease of 677,000 from the previous week's revised level of 3.846 million. China's exports rose in April despite global outbreak of covid-19, data from the General Administration of Customs revealed Thursday. Exports rose 3.5% on a yearly basis after falling 6.6% in March. Imports also fell 14.2% on year in April after March's 0.9% drop. The trade balance showed a surplus of \$45.34 billion, increasing sharply from \$19.9 billion in March. German industrial production dropped a record pace in March due to the impact of the Covid-19 pandemic, preliminary data from Destatis showed on Thursday. Industrial production dropped a seasonally and calendar-adjusted 9.2% month-on-month, which was the worst decline since the time series began in January 1991. The Bank of England maintained its key interest rate at a record low of 0.1% and refrained from unveiling additional quantitative easing. However, Governor Andrew Bailey kept the door open for further easing as the economy is set to contract the most in more than 300 years due to the lockdown announced to curb the spread of coronavirus.

Global Equities: US stocks surged. With the upward move on the day, the tech-heavy Nasdaq returned to positive territory for 2020.

Indian Economy: India's economy is poised to recover as state-run banks have sanctioned loans worth Rs 5.66 lakh crore over last two months to about 4.2 million account holders belonging to micro, small and medium enterprises (MSMEs), retail, agriculture and corporate sectors, Union finance minister Nirmala Sitharaman's office said on Thursday. The banks will disburse the money after the Covid-19 lockdown is lifted. The minister also said that as many as 3.2 crore borrowers have taken advantage of the three-month moratorium scheme on repayment of loans announced by the Reserve Bank to help consumers tide over the problems created on account of disruption in business activities due to lockdown.

Equity Markets: Domestic shares ended with modest losses. A rapid increase in new cases of coronavirus in India in the last few days spoiled investors sentiment. Trading was volatile due to expiry of weekly index options. The barometer S&P BSE Sensex lost 242.37 points or 0.76% at 31,443.38. The Nifty 50 index fell 71.85 points or 0.78% at 9,199.05.

Corporate News: Reliance Industries (RIL) and Jio Platforms announced today that Vista Equity Partners (Vista) will invest Rs 11,367 crore into Jio Platforms. This investment values Jio Platforms at an equity value of Rs 4.91 lakh crore and an enterprise value of Rs 5.16 lakh crore. Tata Motors announced that the company has decided to withdraw the issue for private placement of unsecured NCDs aggregating up to Rs 1000 crore in view of the higher cost expectations from the market participants due to the tight money market conditions. SKF India announced that the board of directors of the company has recommended a special dividend of Rs 130 per share for the financial year ended 31 March 2020.

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FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(42.9)	(83.1)	(10.4)
MF(INR cr)	(1,299.6)	(1,298.9)	(528.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	78,176	57,499	50,841
F&O(INR cr)	2,279,857	1,367,949	1,188,872

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.4	34.5	40.0
NSE VIX	39.9	41.6	44.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,492	(1.0) %	7.0 %	Energy	12,829	(0.6) %	19.1 %
IT	13,293	(0.8) %	10.4 %	Pharma	9,148	(0.9) %	30.2 %
Metals	1,696	(0.1) %	9.1 %	Finance	9,576	(1.6) %	7.1 %
Auto	5,519	(0.6) %	18.5 %	PSU	1,195	0.1 %	(6.8) %
FMCG	26,255	(1.4) %	(0.4) %	Real Estate	171	(0.2) %	(0.8) %

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>
Bharti Inf	173	7.4 %	11.4 %	Pidilite I	1,353	(5.4) %	4.3 %
IndusInd B	454	6.8 %	32.8 %	O N G C	76	(4.6) %	15.0 %
Adani Port	282	4.5 %	15.4 %	NTPC	90	(4.5) %	11.7 %
Hind.Zinc	176	4.1 %	9.9 %	Havells In	487	(4.2) %	0.5 %
Oracle Fin	2,497	4.0 %	30.0 %	B P C L	330	(4.1) %	8.8 %

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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