



08 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,142	1.1 %	22.9 %
BSE SENSEX	34,287	0.9 %	21.3 %
CNX BANK	21,035	3.2 %	15.5 %
CNX MIDCAP	14,158	1.8 %	23.4 %
CNX SMALLCAP	4,423	3.4 %	24.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,111	3.2 %	(5.0) %
S&P 500	3,194	2.6 %	(1.1) %
FTSE 100	6,484	2.3 %	(14.7) %
HANG SENG	24,770	1.7 %	(13.2) %
NIKKEI	22,864	0.7 %	(1.5) %
SHANGHAI COMPOSITE	2,931	0.4 %	(5.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.20	0.1 %	5.6 %
EUR/USD	1.13	0.5 %	0.9 %
GBP/USD	1.26	0.7 %	(4.1) %
USD/JPY	109.43	0.4 %	0.7 %
USD/AUD	1.43	(0.7) %	0.6 %
USD/SGD	1.39	(0.4) %	3.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	5.7 %	(35.4) %
Gold(INR/10g)	46,525	(0.2) %	19.3 %
Gold Comex(USD/oz)	1,688	(1.8) %	9.4 %
SILVER(INR/1Kg)	47,781	(0.5) %	3.7 %
Aluminium(USD/MT)	1,554	1.2 %	(12.3) %
Copper(USD/MT)	5,588	2.5 %	(9.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.9	0.1 %	(1.0) %

Global Economy: The US nonfarm payrolls data showed a strong rise in jobs and the rate of unemployment fell as well. The US added 2.5 million nonfarm jobs in May and the unemployment rate fell to 13.3% from 14.7% in the previous period. The economy had lost 20.687 million jobs in April. However, the average hourly earnings fell by 1% month on month after 4.7% in April. Germany's manufacturing orders fell at a record pace in April, extending the trend from the previous month, as the coronavirus pandemic hurt demand severely, preliminary figures from the statistical office Destatis showed on Friday. New orders in manufacturing fell a seasonally and calendar-adjusted 25.8% from March, when they declined 15%, which was revised from 15.6%. This is the largest decline since the beginning of the time series in January 1991, Destatis said. On a year-on-year basis, factory orders tanked a calendar-adjusted 36.6% year-on-year after a revised 15.4% decline in March. Japan leading index, which measures the future economic activity, fell to 76.2 in April from 85.1 in March, data from the Cabinet Office showed Friday. The latest reading was the lowest since March 2009, when it was 74.2.

Global Equities: The US stocks jumped on Friday following the release of a sharp rebound in employment in the month of May. DOW spiked 3.2% while the tech-heavy Nasdaq hit a new record intraday high.

Indian Economy: Petrol and diesel prices were raised on Sunday by 60 paise per litre, as the state-owned oil firms restarted daily price revisions after nearly three months. Petrol price in Delhi was hiked to Rs 71.86 per litre from Rs 71.26 a litre till Saturday, while diesel rates were increased to Rs 69.99 per litre from Rs 69.39, according to a price notification of state oil marketing companies. Gross direct tax collections for 2019-20 fell almost 5% at Rs 12.33 lakh crore against the previous year's Rs 12.97 lakh crore, the Central Board of Direct Taxes (CBDT) said. This fall in the collection of direct taxes is on expected lines and is temporary in nature due to the historic tax reforms undertaken and much higher refunds issued during the FY 2019-20, CBDT noted.

Equity Markets: Domestic shares ended with strong gains on Friday (5 June) as persistent foreign fund inflows and positive cues from global markets boosted sentiment. Investors focused on early signs of some improvement in the economy amid gradual lifting of lockdown measures in India. The barometer S&P BSE Sensex gained 306.54 points or 0.9% at 34,287.24. The Nifty 50 index rallied 113.05 points or 1.13% at 10,142.15. The broad-based rally was led by banks and metal shares.

Corporate News: Reliance Industries will be in focus as Jio Platforms is set to raise an additional Rs 5863.50 crore from Abu Dhabi Investment Authority (ADIA) by selling 1.16% equity stake. ADIA is now the seventh investor to pick up a stake in the Mukesh Ambani led company in seven weeks. State Bank of India (SBI) - the country's largest lender by assets - on Friday reported a net profit of Rs 3,580.81 crore for the quarter ended March 2020. SBI said its total income from operations came in at Rs 76,027.51 crore in the final quarter of 2019-20, up marginally on the year. Asset quality improved as gross non-performing assets as a percentage of total loans came in at 6.15% in the fourth quarter of 2019-20, as against 6.94% in the quarter ended December 31. Infrastructure major Larsen & Toubro reported a consolidated profit of Rs 3,197 crore in the quarter ended March 2020, registering a 6.5% drop YoY. Consolidated revenue from operations grew by 2.2% to Rs 44,245.28 crore in Q4FY20, impacted by COVID-19-led lockdown.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	347.4	649.2	107.1
MF(INR cr)	(1,200.5)	(922.2)	(105.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	67,594	68,093	54,630
F&O(INR cr)	879,210	1,422,096	1,252,995

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.5	25.8	35.2
NSE VIX	28.7	29.9	39.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,035	3.2 %	15.5 %	Energy	13,925	1.6 %	29.3 %
IT	14,627	0.0 %	21.4 %	Pharma	10,081	0.0 %	43.5 %
Metals	2,050	3.9 %	31.9 %	Finance	10,335	2.2 %	15.6 %
Auto	6,629	1.8 %	42.3 %	PSU	1,387	6.8 %	8.1 %
FMCG	29,542	(0.3) %	12.1 %	Real Estate	202	2.4 %	17.4 %

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>
Vodafone I	11	22.1 %	244.3 %	TCS	2,048	(2.1) %	19.9 %
Tata Motor	111	12.4 %	63.0 %	Aurobindo	744	(2.0) %	89.7 %
Tata Motor	47	11.4 %	56.8 %	Marico	326	(2.0) %	22.9 %
Punjab Nat	34	8.9 %	10.8 %	Hind. Unil	2,088	(1.6) %	(4.2) %
Bajaj Hold	2,440	8.9 %	39.1 %	Cipla	651	(1.5) %	57.3 %

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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