



09 Jun.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,166	(0.0) %	23.2 %
BSE SENSEX	34,371	0.2 %	21.9 %
CNX BANK	21,187	0.0 %	16.4 %
CNX MIDCAP	14,223	0.0 %	24.0 %
CNX SMALLCAP	4,478	0.0 %	26.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,572	1.7 %	(3.4) %
S&P 500	3,232	1.2 %	0.0 %
FTSE 100	6,473	(0.2) %	(14.9) %
HANG SENG	24,777	0.0 %	(13.2) %
NIKKEI	23,178	1.4 %	(0.1) %
SHANGHAI COMPOSITE	2,938	0.2 %	(4.8) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.23	0.2 %	5.7 %
EUR/USD	1.13	0.3 %	0.7 %
GBP/USD	1.27	1.1 %	(3.7) %
USD/JPY	109.03	0.0 %	0.4 %
USD/AUD	1.43	(1.1) %	0.3 %
USD/SGD	1.39	(0.6) %	3.3 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	5.7 %	(35.4) %
Gold(INR/10g)	46,264	(0.6) %	18.6 %
Gold Comex(USD/oz)	1,688	(1.8) %	9.4 %
SILVER(INR/1Kg)	47,633	(0.3) %	3.4 %
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 Covid-19 pandemic and subsequent lockdown measures have thrown the world economy in turmoil. Even as countries are reopening, the World Bank predicts this year, the globe will have its deepest global recession in 80 years. Worldwide gross domestic product will contract 5.2% in 2020. China's exports contracted by 3.3% in May fell 3.3% from a year earlier, after a 3.5% gain in April, customs data showed on Sunday. While exports fared alright, imports tumbled 16.7% compared with a year earlier, following a 14.2% decline the previous month and marking the sharpest decline since January 2016. China reported a trade surplus of \$62.93 billion last month, rising sharply from \$45.34 billion surplus in April. Euro area economic sentiment edged up in June due to the relaxation of measures to curb the coronavirus pandemic, survey results from the behavioral research firm Sentix showed Monday. The headline Sentix investor confidence index rose to -24.8 in June from -41.8 in May. Germany's industrial production declined at the fastest rate since the series began in 1991, data from Destatis showed Monday. Industrial output decreased 25.3% year-on-year in April, following an 11.3% fall in the previous month. Japan's Eco Watchers Survey, a measure of the public assessment of the country's economy rose in May after falling in the previous month, survey data from the Cabinet Office showed on Monday. The current conditions index, which measures the current situation of the economy, increased to a three-month high of 15.5 in May from 7.9 in April. Japan's gross domestic product was revised down to 2.2% on year in the first quarter of 2020, the Cabinet Office said in Monday's final reading, following last month's preliminary reading that had suggested a yearly drop of 3.4%.

**Global Equities:** US stocks added to recent gains on hopes of a swift recovery from a coronavirus-driven downturn. Some selling was seen in the European markets though.

**Indian Economy:** India's economy will contract by 3.2% in the current fiscal, the World Bank said on Monday. The Washington-based multilateral lender said that the COVID-19 pandemic and the multi-phased lockdown imposed to curb its spread has resulted in a devastating blow to the Indian economy. Stringent measures are set to restrict the spread of the virus, which heavily curtail short-term activity, will contribute to the contraction. The Reserve Bank on Monday proposed a comprehensive framework for sale of loan exposures, which could be standard, sub-standard or non-performing assets (NPAs), as part of the overall exercise to deepen the market for lending.

**Equity Markets:** Sensex and the Nifty ended with small gains after a volatile session on Monday. Profit selling emerged at higher levels after recent run up in share prices. The barometer S&P BSE Sensex rose 83.34 points or 0.24% at 34,370.58. The Nifty 50 index added 25.30 points or 0.25% at 10,167.45. In the broader market, the BSE Mid-Cap index rose 0.23% and the BSE Small-Cap index gained 0.93%.

**Corporate News:** State Bank of India slashed its key lending rates - the marginal cost lending rate (MCLR) and the external benchmark rate (EBR) by 25 basis points and 40 basis points respectively. The one year MCLR comes down to 7.00% p.a from 7.25% p.a. with effect from June 10, 2020. Hero Motocorp, Bombay Dyeing, Century Enka, Gujarat Pipavav Port and Graphite India will announce latest earnings today. Metals and mining counters could be in focus as COMEX Copper soared 1% yesterday to consolidate around three month high.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1.3	519.6	104.5
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)	3,996	57,410	53,452
F&O(INR cr)	1,142,760	1,375,540	1,250,431

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.5	25.8	35.2
NSE VIX	29.7	29.8	39.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,187	0.7 %	16.4 %	Energy	14,141	1.5 %	31.3 %
IT	14,895	1.8 %	23.6 %	Pharma	9,939	(1.4) %	41.4 %
Metals	2,045	(0.2) %	31.6 %	Finance	10,360	0.2 %	15.9 %
Auto	6,611	(0.3) %	41.9 %	PSU	1,371	(1.2) %	6.8 %
FMCG	29,502	(0.1) %	11.9 %	Real Estate	203	0.3 %	17.8 %

### 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>
Indiabulls	149	14.4 %	50.0 %	Interglobe	1,117	(6.1) %	11.8 %
Vodafone I	12	14.3 %	293.4 %	Motherson	99	(4.6) %	71.3 %
General In	152	10.0 %	44.0 %	Zee Entert	197	(4.4) %	63.0 %
Ashok Leyl	53	9.7 %	29.1 %	Shree Ceme	21,181	(4.1) %	28.0 %
GAIL (Indi	105	7.1 %	38.3 %	Havells In	546	(3.8) %	12.7 %

### 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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