



10 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,047	0.0 %	21.7 %
BSE SENSEX	33,957	(1.2) %	20.1 %
CNX BANK	20,725	0.0 %	13.8 %
CNX MIDCAP	14,169	0.0 %	23.5 %
CNX SMALLCAP	4,414	0.0 %	24.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,272	(1.1) %	(4.4) %
S&P 500	3,207	(0.8) %	(0.7) %
FTSE 100	6,336	(2.1) %	(16.7) %
HANG SENG	25,057	1.1 %	(12.2) %
NIKKEI	23,091	(0.4) %	(0.5) %
SHANGHAI COMPOSITE	2,956	0.6 %	(4.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.26	0.1 %	5.7 %
EUR/USD	1.13	(0.1) %	0.8 %
GBP/USD	1.27	0.5 %	(3.6) %
USD/JPY	107.92	(1.4) %	(0.7) %
USD/AUD	1.44	0.1 %	0.7 %
USD/SGD	1.39	(0.3) %	3.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	38	0.0 %	(37.6) %
Gold(INR/10g)	46,588	0.7 %	19.5 %
Gold Comex(USD/oz)	1,725	1.2 %	11.8 %
SILVER(INR/1Kg)	47,557	(0.2) %	3.3 %
Aluminium(USD/MT)	1,566	(0.3) %	(11.7) %
Copper(USD/MT)	5,681	0.4 %	(7.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.8	(0.1) %	(1.1) %

Global Economy: Wholesale inventories in the US increased in the month of April, according to a report released by the Commerce Department on Tuesday. The Commerce Department said wholesale inventories rose by 0.3% in April after tumbling by a revised 1.1% in March. Euro area gross domestic product declined 3.6% sequentially in the first quarter as member countries initiated coronavirus containment measures in March, but slower than the initial estimate of -3.8%, the revised estimate published by Eurostat showed on Tuesday. Nonetheless, this was the biggest contraction since the time series began in 1995. The fall reversed a 0.1% growth logged in the fourth quarter of 2019. On a yearly basis, GDP shrank 3.1%, reversing previous quarter's 1% expansion. The first quarter rate was revised from -3.3% and was the largest fall since the third quarter of 2009. Germany's exports decreased 31.1% year-on-year in April following a 7.7% drop in March, data published by Destatis revealed Tuesday. This was the biggest fall since the introduction of foreign trade statistics in 1950. At the same time, imports decreased 21.6 % annually after falling 4.4% a month ago. The last time imports went down that much was in July 2009 during the global financial crisis. Consequently, the trade surplus declined to EUR 3.5 billion, the lowest since December 2000, from EUR 17.8 billion in the same period last year. On a monthly basis, the decline in exports deepened to 24% from 11.7% in March. UK retail sales declined in May but at a slower pace as restrictions to contain the spread of coronavirus eased, data from the British Retail Consortium, or BRC, showed Tuesday. Total retail sales decreased 5.9% year-on-year in May, slower than the 19.1% fall in April. Australia's business conditions and confidence improved in May but remained deeply negative, survey data from National Australia Bank showed Tuesday. The business conditions index gained 10 points to -24 in May after hitting the lowest level since the global financial crisis.

Global Equities: US stocks saw nervous moves as overall sentiments remained cautious ahead of the US FOMC interest rate decision due on Wednesday.

Indian Economy: The government of India (GoI) has announced the sale (issue/re-issue) of dated securities for Rs 30000 crore. These include New GS 2025 (maturing on June 15, 2025) 12,000, 6.19% GS 2034 11,000 and 7.16% GS 2050 7,000. GoI will have the option to retain additional subscription up to Rs 2,000 crore each against any one or more of the above security. The US, China, Japan and four others at the World Trade Organization have once more asked India to roll back its Customs tariffs on telecom and other products such as mobile phones and cameras, which they allege are inconsistent with its multilateral commitments.

Equity Markets: The local market ended with steep losses on Tuesday, due to profit selling after recent run up in share prices. Correction in index pivots Reliance Industries, HDFC bank and ICICI Bank put pressure on bourses. The barometer S&P BSE Sensex fell 413.89 points or 1.20% at 33,956.69. The Nifty 50 index fell 120.80 points or 1.19% at 10,046.65. Profit selling at higher levels dragged Nifty to the day's low of 10,021.45 in the mid-afternoon session.

Corporate News: Maruti Suzuki reported production of 3,714 vehicles in May against 1,51,188 vehicles in the same month last year. State-owned BHEL announced commissioning of 270 mega watt (MW) thermal power plant in Telangana. Adani Green Energy on Tuesday said it has won the world's largest solar order to build 8 gigawatts of photovoltaic (PV) power plant along with a domestic solar panel manufacturing unit at an investment of Rs 45,000 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	139.2	456.2	105.4
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)	3,420	49,697	52,315
F&O(INR cr)	1,483,360	1,390,943	1,255,725

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.6	26.1	34.8
NSE VIX	30.2	29.9	39.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,725	(2.2) %	13.8 %	Energy	13,895	(1.7) %	29.0 %
IT	14,738	(1.1) %	22.3 %	Pharma	10,122	1.8 %	44.1 %
Metals	2,023	(1.1) %	30.2 %	Finance	10,163	(1.9) %	13.7 %
Auto	6,578	(0.5) %	41.2 %	PSU	1,348	(1.7) %	5.1 %
FMCG	29,525	0.1 %	12.0 %	Real Estate	203	0.0 %	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>
Adani Tran	188	4.9 %	(0.5) %	Vodafone I	10	(16.3) %	229.5 %
New India	132	4.2 %	24.8 %	Ashok Leyl	51	(4.3) %	23.5 %
Dr Reddy's	4,124	3.9 %	33.2 %	Wipro	218	(3.6) %	15.2 %
General In	157	3.4 %	48.9 %	GAIL (Indi	101	(3.5) %	33.5 %
Aurobindo	775	3.2 %	97.5 %	Tata Motor	111	(3.5) %	64.0 %

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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