



11 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,252	0.6 %	12.1 %
BSE SENSEX	31,643	0.6 %	11.9 %
CNX BANK	19,353	(0.7) %	6.3 %
CNX MIDCAP	12,789	(0.3) %	11.5 %
CNX SMALLCAP	3,911	(0.8) %	10.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,331	1.9 %	(14.7) %
S&P 500	2,930	1.7 %	(9.3) %
FTSE 100	5,936	1.4 %	(21.9) %
HANG SENG	24,230	1.0 %	(15.1) %
NIKKEI	20,179	2.6 %	(13.0) %
SHANGHAI COMPOSITE	2,895	0.8 %	(6.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.86	(0.4) %	5.1 %
EUR/USD	1.08	0.3 %	(3.3) %
GBP/USD	1.24	0.1 %	(6.0) %
USD/JPY	106.50	0.3 %	(2.0) %
USD/AUD	1.53	(1.6) %	7.5 %
USD/SGD	1.41	(0.5) %	5.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	25	5.5 %	(59.6) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,717	(1.3) %	11.3 %
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	0.7	0.0 %	(1.2) %

Global Economy: The US labour markets remained under heavy stress as coronavirus-induced economic shutdown hurt the economy. The US nonfarm payrolls saw a record drop of 20.5, the Labor Department reported. The unemployment rate surged to 14.7%. The U3 unemployment rate rose from a 50-year low of 3.5% to 22%. This number measures the people of working age who are not in employment. Meanwhile, average weekly hours rose from the previous 34.1 to 33.2. On a month over month basis, the wages rose from the previous 0.5% to 4.7%. Most of the German companies expect decline in sales in the whole year of 2020 as coronavirus related crisis is expected to last longer, a survey from the German Chamber of Commerce and Industry, or DIHK, showed Friday. About 80% of companies across industry, construction and service sectors expect a decline in sales for the whole year. One in four forecast a 50% reduction in sales.

Global Equities: US stocks jumped on Friday. The major averages added to the gains posted in the previous session, with the tech-heavy Nasdaq reaching its best closing level in well over two months.

Indian Economy: The government plans to borrow Rs 12 lakh crore (\$160 billion) in the fiscal year to March 2021, up from the previously budgeted Rs 7.8 lakh crore. The revision in borrowings has been necessitated on account of the COVID-19 pandemic. Scheduled commercial banks (SCBs) credit growth eased on sequential basis to 6.7% YoY to Rs 10269258 crore as on 24 April 2020, compared with 7.2% growth a fortnight ago. The credit growth has also decelerated from 13.0% at end April 2020. Non-food credit, accounting for 99.5% of the share of the total credit, recorded a growth of 6.7% , YoY, at Rs 10216615 crore as on 24 April 2020 as against a rise of 7.0% fortnight ago and 13.1% rise a year ago. Food credit moved up 22.0% to Rs 52643 crore as on 24 April 2020. The procurement of wheat and rice (second crop) during the ongoing Rabi season has picked up pace despite severe logistical constraints posed due to the countrywide lockdown. Against the target of 400 Lakh Metric Tonnes (LMT) of wheat, procurement for central pool has touched 216 LMT upto 06.05.20.

Equity Markets: The market ended with decent gains on Friday, supported by positive global cues. Firmness in index majors Reliance Industries (RIL) and Hindustan Unilever (HUL) boosted indices higher. However, weakness in banks shares capped gains. The barometer S&P BSE Sensex gained 199.32 points or 0.63% at 31,642.70. The Nifty 50 index gained 52.45 points or 0.57% at 9,251.50. The market breadth was negative. On the BSE, 1031 shares rose and 1289 shares fell. A total of 190 shares were unchanged.

Corporate News: Pharma major Lupin Limited (Lupin) announced the successful close out of the inspection carried out by the Medicines and Healthcare products Regulatory Agency (MHRA), the regulatory agency of the United Kingdom (UK), at its three manufacturing units in Pithampur (India). The inspection for the three units at Pithampur (Unit I, Unit II and Unit III) was conducted in January 2020. ICICI Bank, the country's second largest private sector lender by assets, on May 9 has reported standalone profit at Rs 1,221 crore in quarter ended March 2020. Profit in the same period last year was at Rs 969.06 crore. Net interest income for the quarter stood at Rs 8,927 crore, against Rs 7,620.06 crore in the year-ago period. NOCIL said that company has partially resumed its manufacturing operations.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	2,262.2	698.7	103.3
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)	50,284	56,056	50,817
F&O(INR cr)	576,735	1,209,706	1,162,257

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.0	33.4	39.5
NSE VIX	38.4	40.8	44.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,353	(0.7) %	6.3 %	Energy	12,897	0.5 %	19.7 %
IT	13,404	0.8 %	11.3 %	Pharma	9,343	2.1 %	33.0 %
Metals	1,677	(1.1) %	7.9 %	Finance	9,559	(0.2) %	6.9 %
Auto	5,448	(1.3) %	17.0 %	PSU	1,172	(2.0) %	(8.7) %
FMCG	26,760	1.9 %	1.5 %	Real Estate	170	(0.6) %	(1.5) %

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>
HDFC Life	520	5.2 %	21.0 %	Bandhan Ba	240	(4.8) %	23.1 %
Hind. Unil	2,089	4.9 %	(4.1) %	Axis Bank	382	(3.9) %	6.5 %
Colgate-Pa	1,360	4.5 %	9.4 %	NTPC	87	(3.8) %	7.4 %
Nestle Ind	17,803	3.9 %	13.7 %	Power Fin.	84	(3.8) %	(5.5) %
Tech Mahin	536	3.8 %	4.9 %	M & M	387	(3.5) %	41.7 %

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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