



12 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,239	(0.1) %	11.9 %
BSE SENSEX	31,561	(0.3) %	11.7 %
CNX BANK	18,951	(2.1) %	4.1 %
CNX MIDCAP	12,863	0.6 %	12.1 %
CNX SMALLCAP	3,905	(0.1) %	10.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,222	(0.5) %	(15.1) %
S&P 500	2,930	0.0 %	(9.3) %
FTSE 100	5,940	0.1 %	(21.9) %
HANG SENG	24,602	1.5 %	(13.8) %
NIKKEI	20,391	1.1 %	(12.1) %
SHANGHAI COMPOSITE	2,895	(0.0) %	(6.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.13	(0.0) %	5.5 %
EUR/USD	1.08	0.1 %	(3.5) %
GBP/USD	1.24	(0.2) %	(6.2) %
USD/JPY	107.34	1.1 %	(1.2) %
USD/AUD	1.54	(1.3) %	7.8 %
USD/SGD	1.42	(0.3) %	5.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	24	(2.4) %	(60.5) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,707	(0.6) %	10.6 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,455	0.3 %	(17.9) %
Copper(USD/MT)	5,231	0.1 %	(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: Auto sales in China rose last month for the first time in nearly two years on increased demand for commercial vehicles. Total sales increased 4.4% in April compared to the same month a year ago to just over 2 million vehicles, according to data published Monday by the China Association of Automobile Manufacturers. China's bank lending declined in April as the central bank intensified its monetary policy measures to support the economy hit by coronavirus pandemic. Bank lending decreased to CNY 1.7 trillion from CNY 2.85 trillion in March, data from the People's Bank of China showed. Bank of Japan (BOJ) policymakers have called for close coordination with government for policy formulation so as to avoid a Great Depression amid coronavirus pandemic, the Summary of Opinions at the Monetary Policy Meeting, held on April 27, showed Monday. Policy authorities must act decisively in order to avoid a second Great Depression.

Global Equities: European markets turned lower as investors braced for effects of lockdown reopenings and US-China tension. US stocks edged up after weak start.

Indian Economy: Department of Agriculture, Cooperation and Farmers Welfare stated in a latest update that sowing of Summer Crops continues at a good pace despite the nation-wide lockdown. As on 10th May 2020, about 34.87 lakh hectare (ha) area has been covered under summer rice as compared to 25.29 lakh ha during the corresponding period of last year. The government released Rs 6,195.08 crore to 14 states as the second equated monthly installment of the Post Devolution Revenue Deficit Grant on Monday. This would provide them additional resources during the Corona crisis.

Equity Markets: The market ended the volatile session with small losses on Monday, dragged by weakness in banks and financial stocks. The barometer S&P BSE Sensex fell 81.48 points or 0.26% at 31,561.22. The Nifty 50 index was down 12.30 points or 0.13% at 9,239.20. The Nifty slipped below 9300 mark as selling pressure intensified in banks shares in afternoon trade. The index slipped into negative terrain and hit the day's low of 9,219.95 in late trade.

Corporate News: Bajaj Auto on Monday said it has commenced reopening of dealerships and service centres in various parts of the country following relaxation in guidelines by the government for the third phase of lockdown till May 17. Godrej Agrovet Q4FY20 profit fell to Rs 74.58 crore versus Rs 113.69 crore while revenue rose to Rs 1,627.68 cr versus Rs 1,390.91 crore YoY. Nestle India, Bandhan Bank, Havells, Blue Star would be in focus ahead of earnings today.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	285.5	595.4	112.0
MF(INR cr)	3,856.4	251.3	(316.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	49,135	54,903	50,747
F&O(INR cr)	829,846	1,146,396	1,148,406

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.0	33.4	39.5
NSE VIX	38.0	40.2	44.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	18,951	(2.1) %	4.1 %	Energy	12,920	0.2 %	19.9 %
IT	13,594	1.4 %	12.8 %	Pharma	9,307	(0.4) %	32.5 %
Metals	1,698	1.3 %	9.3 %	Finance	9,386	(1.8) %	5.0 %
Auto	5,680	4.3 %	21.9 %	PSU	1,165	(0.6) %	(9.2) %
FMCG	26,668	(0.3) %	1.2 %	Real Estate	171	0.9 %	(0.6) %

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	5	9.5 %	50.8 %	ICICI Bank	320	(5.2) %	2.9 %
Hero Motoc	2,089	6.4 %	27.4 %	B P C L	315	(3.1) %	3.9 %
Tata Motor	86	6.2 %	26.7 %	Dr Reddy's	3,862	(3.1) %	24.8 %
Maruti Suz	4,938	6.1 %	16.3 %	HDFC AMC	2,543	(2.9) %	16.3 %
Bajaj Auto	2,566	6.1 %	25.1 %	Kotak Mah.	1,188	(2.4) %	0.6 %

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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