



12 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,501	(4.1) %	15.1 %
BSE SENSEX	33,538	(2.1) %	14.8 %
CNX BANK	20,525	0.0 %	12.7 %
CNX MIDCAP	14,158	0.0 %	23.4 %
CNX SMALLCAP	4,398	0.0 %	24.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,128	(6.9) %	(11.9) %
S&P 500	3,002	(5.9) %	(7.1) %
FTSE 100	6,077	(4.0) %	(20.1) %
HANG SENG	24,480	(2.3) %	(14.2) %
NIKKEI	22,473	(2.8) %	(3.2) %
SHANGHAI COMPOSITE	2,921	(0.8) %	(5.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.71	0.6 %	6.3 %
EUR/USD	1.13	0.4 %	1.2 %
GBP/USD	1.27	(0.4) %	(4.0) %
USD/JPY	106.91	(0.9) %	(1.6) %
USD/AUD	1.45	0.8 %	1.6 %
USD/SGD	1.39	(0.1) %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	36	(8.2) %	(40.6) %
Gold(INR/10g)	47,206	0.9 %	21.1 %
Gold Comex(USD/oz)	1,733	(1.0) %	12.3 %
SILVER(INR/1Kg)	48,309	1.8 %	4.9 %
Aluminium(USD/MT)	1,582	(2.0) %	(10.7) %
Copper(USD/MT)	5,802	0.0 %	(5.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	(0.0) %	(1.2) %

Global Economy: Around 1.54 million Americans applied for traditional jobless benefits in early June and more than 700,000 sought compensation through an emergency federal program, reflecting both a steady decline in job losses from the coronavirus related economic stress. The wholesale cost of US goods and services rebounded in May after three straight monthly declines, the Labor Department said Thursday. The producer price index rose 0.4% in May after a record 1.3% decline in the prior month. Germany's economic stimulus package worth EUR 130 billion should increase economic output by 1.3% this year and next, the DIW Institute said Thursday. According to DIW, the largest euro area economy will shrink 9.4% in 2020 but will expand 3% next year. If the stimulus package is implemented as designed, the economic slump should be lower this year at -8.1%, the institute said. UK house price indicator moved deeper into negative territory in May amid coronavirus pandemic, survey data from the Royal Institution of Chartered Surveyors, or RICS, showed Thursday. The house price balance fell to -32% in May from -22% in April. This was the weakest monthly figure since 2010. Moreover, near-term price expectations remained tepid, with the index standing at -43%. Further, a net -16% forecast prices to fall over the year ahead. Japan's large business firms' sentiment deteriorated sharply in the second quarter, according to business outlook survey conducted by the Cabinet Office and the Ministry of Finance. The index for business conditions among large companies declined to -47.6 in the second quarter from -10.1 in the previous quarter.

Global Equities: The DOW plunged nearly 7% during the last session. The index saw its worst day since March as coronavirus cases rose in the US and economic outlook stayed tepid.

Indian Economy: India's fuel product consumption or sales dipped 23.3% to 14.65 million tonnes (mt) in May 2020 over a year ago. However, the consumption of fuel products has jumped 47.5% over 9.94 mt in April 2020. Diesel sales plunged 29.4% to 5.50 mt, petrol 35.4% to 1.77 mt, petcoke 28.7% to 1.52 mt, ATF 83.6% to 0.11 mt and others 19.3% to 0.79 mt in May 2020 over April 2020. Consumption or sales of fuel products rose 34.3% to 24.58 mt in April-May 2020-21 over April-May 2019-20. Sales of diesel plunged 42.1% to 8.74 mt, petrol 47.2% to 2.74 mt.

Equity Markets: Domestic shares ended with heavy losses on Thursday, mirroring weakness in global stock markets. Rising COVID-19 cases in India also dented sentiment. The barometer S&P BSE Sensex slumped 708.68 points or 2.07% at 33,538.37. The Nifty 50 index tumbled 214.15 points or 2.12% at 9,902. Selling pressure build up in mid-morning trade which dragged the index lower as the session progressed. The Nifty hit the day's low of 9,885.05 in late trade.

Corporate News: HDFC Ltd will raise up to Rs 4,000 crore by issuing bonds on private placement basis. The issue size of the secured redeemable non-convertible debentures, to open on June 15, 2020, is of Rs 2,100 crore with option to retain over-subscription up to Rs 1,900 crore. State Bank of India will sell 2.1% equity stake in its life insurance business -- SBI Life Insurance Company -- through an offer for sale in the next two trading sessions. Eicher Motors, Hindalco Industries, Mahindra & Mahindra, Goodyear India, and Castrol India will report latest earnings today.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(49.1)	343.9	100.9
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)	3,338	39,350	50,177
F&O(INR cr)	3,164,015	1,618,874	1,306,200

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.6	26.3	34.7
NSE VIX	29.7	29.8	38.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,525	(2.7) %	12.7 %	Energy	13,746	(1.5) %	27.6 %
IT	14,619	(1.5) %	21.4 %	Pharma	9,933	(2.1) %	41.4 %
Metals	1,955	(2.8) %	25.8 %	Finance	10,036	(2.4) %	12.2 %
Auto	6,374	(2.0) %	36.8 %	PSU	1,341	(3.9) %	4.5 %
FMCG	29,092	(1.4) %	10.4 %	Real Estate	202	(2.1) %	17.5 %

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>
IndusInd B	523	4.7 %	52.9 %	Vodafone I	9	(13.4) %	208.2 %
Adani Tran	200	1.0 %	5.5 %	Bharti Inf	211	(9.4) %	35.9 %
HDFC AMC	2,640	1.0 %	20.8 %	Zee Entert	176	(7.3) %	45.5 %
Petronet L	255	0.8 %	27.6 %	St Bk of I	177	(5.6) %	(5.0) %
Hero Motoc	2,310	0.8 %	40.9 %	Indiabulls	153	(5.3) %	54.2 %

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					

..... End of Report