



15 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,143	0.0 %	10.8 %
BSE SENSEX	31,123	(2.8) %	10.1 %
CNX BANK	19,069	0.0 %	4.7 %
CNX MIDCAP	13,018	0.0 %	13.5 %
CNX SMALLCAP	3,936	0.0 %	11.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,625	1.6 %	(17.2) %
S&P 500	2,853	1.2 %	(11.7) %
FTSE 100	5,742	(2.8) %	(24.5) %
HANG SENG	23,830	(1.5) %	(16.5) %
NIKKEI	19,915	(1.7) %	(14.2) %
SHANGHAI COMPOSITE	2,870	(1.0) %	(7.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.81	0.0 %	5.1 %
EUR/USD	1.08	(0.3) %	(3.7) %
GBP/USD	1.22	(0.8) %	(7.4) %
USD/JPY	107.04	(0.3) %	(1.5) %
USD/AUD	1.55	0.7 %	8.9 %
USD/SGD	1.42	0.4 %	5.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	28	9.0 %	(55.0) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,755	1.3 %	13.8 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,434	(0.4) %	(19.1) %
Copper(USD/MT)	5,156	(1.1) %	(16.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.6	(0.0) %	(1.3) %

Global Economy: The US initial jobless claims fell to 2.981 million, a decrease of 195,000 from the previous week's revised level of 3.176 million. Jobless claims have steadily decreased since reaching a record high of 6.867 million in late March, but the number of new claims has reached nearly 36.5 million since the coronavirus-induced economic shutdown. German consumer price inflation eased to 0.9% in April from 1.4% in March due to lower energy prices amid coronavirus pandemic, Destatis revealed. This was the lowest rate seen since November 2016. UK's ongoing lockdown measures to prevent the spread of the coronavirus are continuing to stifle activity across the housing market, survey results from the Royal Institution of Chartered Surveyors showed. The house price balance dropped into a negative zone after three successive months of positive readings in April.

Global Equities: US stocks saw an excellent rebound on buying in financial and healthcare counters. Hefty losses were seen in Asian and European markets.

Indian Economy: Finance Minister Nirmala Sitharaman said that Rs 2 lakh crore will be made available to 2.5 crore farmers giving them access to institutional credit. Fishermen and animal husbandry farmers will be considered under this scheme. Will seek to enroll more farmers for KISAN cards so that they benefit. FM said that Rs 30,000 crore additional emergency working capital fund through NABARD (over the annual Rs 90,000 crore provision) will be immediately released for small and marginal farmers so that post-harvest rabi produce and preparatory work for kharif crops is supported. For the lower middle income group with annual income of Rs 6-18 lakh the credit linked subsidy scheme introduced in May 2017 which was to last till March 31, 2020 will be extended to March 31, 2021. Jobs creation, steel, cement and heavy duty material will improve following this. FM announced liquidity provision of Rs 5,000 crore will be made by GoI for special credit facility to 50 lakh street vendors. Initial working capital will be of up to Rs 10,000 per person. FM also said that 2% interest subvention extended to those under the Shishu loans of MUDRA will benefit more than 3 crore people. This will give Rs 1,500 crore interest subvention for MUDRA-Shishu loans of up to Rs 50,000. Affordable rental accommodation scheme for migrant workers and urban poor under PM Awas Yojana was also notified.

Equity Markets: Domestic shares slumped on Thursday, tracking weak global cues. Selling in IT and banks stocks put pressure on bourses. FMCG and pharma stocks bucked weak market trend. Trading was volatile due expiry of weekly index options. The Nifty saw a gap down opening at 9,213.95. The index traded sideways with steep losses till afternoon session. Selling pressure intensified in afternoon which dragged the index below 9200 level.

Corporate News: Unichem Labs said that the company received Establishment Inspection Report from USFDA for APIs facility at Roha. Cipla, Crompton Greaves Consumer, L&T Finance Holdings, L&T Technology, M&M Financial, Tata Chemicals would be releasing latest earnings today. Domestic steel production fell by a record 69.5% y-o-y in April 2020 as per provisional figures. The country produced just 2.8 million tonne of crude steel during the month, according to data released by Joint Plan Committee (JPC).



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	17.4	320.3	92.1
MF(INR cr)	(278.5)	(322.1)	(408.8)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	50,990	55,224	51,315
F&O(INR cr)	2,382,282	1,279,436	1,192,530

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	32.6	32.9	38.5
NSE VIX	38.2	39.6	43.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,069	(2.9) %	4.7 %	Energy	12,486	(3.3) %	15.9 %
IT	13,294	(3.5) %	10.4 %	Pharma	9,172	0.3 %	30.5 %
Metals	1,715	(2.6) %	10.4 %	Finance	9,356	(3.3) %	4.6 %
Auto	5,804	(0.7) %	24.6 %	PSU	1,206	(2.6) %	(6.0) %
FMCG	26,934	0.7 %	2.2 %	Real Estate	175	(1.8) %	1.8 %

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>
Bharti Inf	210	6.9 %	35.2 %	L&T Fin.Ho	58	(5.9) %	15.1 %
United Spi	540	5.8 %	16.6 %	ICICI Lomb	1,244	(5.8) %	12.5 %
Godrej Con	564	5.6 %	2.9 %	Tech Mahin	516	(5.3) %	0.9 %
Marico	318	3.7 %	19.9 %	Motherson	80	(5.2) %	38.0 %
Cadila Hea	337	3.7 %	27.7 %	Infosys	658	(5.2) %	9.2 %

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