



15 Jun.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,638	(0.6) %	(11.5) %
BSE SENSEX	52,694	(0.3) %	(11.2) %
CNX BANK	33,311	0.0 %	(10.3) %
CNX MIDCAP	26,716	0.0 %	(11.3) %
CNX SMALLCAP	8,557	0.0 %	(19.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,365	(0.5) %	(16.4) %
S&P 500	3,735	(0.4) %	(21.6) %
FTSE 100	7,187	(0.3) %	(4.2) %
HANG SENG	21,068	0.0 %	(9.5) %
NIKKEI	26,630	(1.3) %	(9.1) %
SHANGHAI COMPOSITE	3,289	1.0 %	(9.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	77.89	0.3 %	4.8 %
EUR/USD	1.04	(2.4) %	(8.3) %
GBP/USD	1.21	(3.5) %	(10.7) %
USD/JPY	134.69	0.5 %	17.0 %
USD/AUD	1.45	3.4 %	5.2 %
USD/SGD	1.39	1.0 %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	121	0.2 %	57.1 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,829	(2.5) %	0.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,589	(3.9) %	(8.0) %
Copper(USD/MT)	9,290	(2.6) %	(3.8) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.4	0.2 %	1.8 %

Global Economy: Germany consumer price inflation accelerated to a new record high in May, as initially estimated, driven by higher energy prices, final data from Destatis showed. Consumer price inflation rose to 7.9 percent in May from 7.4 percent in April. The increase in energy prices had a substantial impact on the inflation rate. Energy product prices surged 38.3 percent from the last year. Further, food prices rose by 11.1 percent for households in May. Prices of goods were up 13.6 percent and that of services climbed 2.9 percent. Excluding energy prices, the inflation rate came in at 4.5 percent in May. Month-on-month, overall consumer prices rose 0.9 percent, in line with preliminary estimate, after climbing 0.8 percent in April. Germany's economic confidence improved in June but remained negative, as per the survey results from the ZEW - Leibniz Centre for European Economic Research. The ZEW Indicator of Economic Sentiment climbed to a four-month high of minus 28.0 points in June from -34.3 in May. The current situation index also improved in May, by 8.9 points to minus 27.6 points. New Zealand posted a seasonally adjusted current account deficit of NZ\$8.5 billion in the first quarter of 2022, according to Statistics New Zealand - following the NZ\$6.6 billion shortfall in the three months prior. The current account deficit for the year ended March 2022 widened to NZ\$23.3 billion (6.5 percent of gross domestic product [GDP]) from the NZ\$8.2 billion deficit for the March 2021 year (2.5 percent of GDP).

Global Indices: The Dow ended the session with a loss of 151.91 points or 0.5 percent at 30,364.83. The S&P 500 ended lower by 14.15 points or 0.38 percent at 3,735.48.

Indian Economy: India's inflation based on the Wholesale Price Index (WPI) rose further in May, hitting 15.88%, according to data released by the commerce ministry today. WPI inflation was 15.08% in April 2022 and 13.11% in May 2021. The high rate of inflation in May, 2022 is primarily due to rise in prices of mineral oils, crude petroleum & natural gas, food articles, basic metals, non-food articles, chemicals & chemical products and food products etc. as compared to the corresponding month of the previous year, stated the Ministry of Commerce and Industry.

Equity Market: The barometer index, the S&P BSE Sensex, declined 153.13 points or 0.29% to 52,693.57. The Nifty 50 index lost 42.30 points or 0.27% to 15,732.10. The Sensex has declined 4.75% and the Nifty has lost 4.53% in three sessions.

Corporate News: Asian Paints has subscribed to 51% of the equity share capital of Weatherseal Fenestration comprising of 10,409 equity shares of Rs. 10 each at a premium of Rs. 18,091 per share, issued on preferential basis for an aggregate cash consideration of Rs. 18.84 crore. Accordingly, Weatherseal Fenestration is now a subsidiary of the company. Wipro is increasing its investment locally in Norway to help its clients capitalize on digital transformation. Within the next two years the company is looking to grow from 85 to 350 employees in Norway.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(456.4)	(280.6)	(238.6)
MF(INR cr)	953.2	793.7	1,229.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	47,097	47,947	58,847
F&O(INR cr)	8,300,841	10,016,543	10,345,099

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	34.0	26.2	26.7
NSE VIX	21.9	20.5	20.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,311	(0.3) %	(10.3) %	Energy	25,178	(0.6) %	(4.8) %
IT	27,953	0.1 %	(23.1) %	Pharma	12,219	0.2 %	(10.0) %
Metals	5,018	0.4 %	(22.5) %	Finance	15,292	(0.4) %	(12.5) %
Auto	11,104	(0.6) %	4.0 %	PSU	2,463	(0.4) %	(13.1) %
FMCG	36,999	(0.2) %	0.8 %	Real Estate	391	0.8 %	(17.6) %

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>
Adani Ente	2,196	5.6 %	7.5 %	Bajaj Auto	3,682	(5.1) %	(1.6) %
One 97	607	4.2 %	6.2 %	I O C L	110	(2.9) %	(9.7) %
Zomato Ltd	70	3.7 %	(17.0) %	IndusInd B	844	(2.5) %	(12.8) %
ICICI Lomb	1,146	2.9 %	(15.0) %	O N G C	156	(2.3) %	(7.1) %
Havells In	1,123	2.7 %	(4.3) %	Hindalco I	358	(2.2) %	(37.2) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Westpac Consumer Sentiment	15-06-2022	06:00	AUD	-	(0.056)
Housing Starts	15-06-2022	17:45	CAD	-	-
SECO Economic Forecasts	15-06-2022	11:30	CHF	-	-
PPI m/m	15-06-2022	12:00	CHF	-	0.013
Industrial Production y/y	15-06-2022	07:30	CNY	-	(0.029)
French Final CPI m/m	15-06-2022	12:15	EUR	-	0.006
Industrial Production m/m	15-06-2022	14:30	EUR	-	(0.018)
German Buba President Nagel Speaks	15-06-2022	14:45	EUR	-	-
ECB President Lagarde Speaks	15-06-2022	21:50	EUR	-	-
Core Machinery Orders m/m	15-06-2022	05:20	JPY	-	0.071
Tertiary Industry Activity m/m	15-06-2022	10:00	JPY	-	0.013
Current Account	15-06-2022	04:15	NZD	-	-
Core Retail Sales m/m	15-06-2022	18:00	USD	-	0.006
Business Inventories m/m	15-06-2022	19:30	USD	-	0.02
Crude Oil Inventories	15-06-2022	20:00	USD	-	-
FOMC Economic Projections	15-06-2022	23:30	USD	-	-

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