



16 Jun.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,814	0.0 %	18.9 %
BSE SENSEX	33,229	(1.6) %	17.6 %
CNX BANK	19,913	0.0 %	9.4 %
CNX MIDCAP	14,169	0.0 %	23.5 %
CNX SMALLCAP	4,410	0.0 %	24.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,763	0.6 %	(9.7) %
S&P 500	3,067	0.8 %	(5.1) %
FTSE 100	6,065	(0.7) %	(20.2) %
HANG SENG	23,777	(2.2) %	(16.7) %
NIKKEI	21,531	(3.5) %	(7.2) %
SHANGHAI COMPOSITE	2,890	(1.0) %	(6.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.66	(0.1) %	6.3 %
EUR/USD	1.13	(0.7) %	0.5 %
GBP/USD	1.25	(0.9) %	(4.9) %
USD/JPY	107.31	0.4 %	(1.2) %
USD/AUD	1.46	0.8 %	2.4 %
USD/SGD	1.39	0.3 %	3.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	2.4 %	(39.3) %
Gold(INR/10g)	46,803	(1.1) %	20.0 %
Gold Comex(USD/oz)	1,737	(0.0) %	12.6 %
SILVER(INR/1Kg)	46,691	(2.1) %	1.4 %
Aluminium(USD/MT)	1,546	(0.9) %	(12.8) %
Copper(USD/MT)	5,646	(2.4) %	(8.4) %

**FIXED INCOME**

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

**Global Economy:** Manufacturing activity in New York steadied in the month of June after seeing sharp contractions in April and May, according to a report released by the Federal Reserve Bank of New York on Monday. The New York Fed general business conditions index spiked to negative 0.2 in June from negative 48.5 in May. China's industrial production grew 4.4% on a yearly basis in May, faster than the 3.9% increase logged in April, data from the National Bureau of Statistics showed Monday. China retail sales dropped at a slower pace of 2.8% in May from last year, slower than the 7.5% decrease seen in April. China's fixed-asset investment fell 6.3% year on year to 19.92 trillion yuan in the first five months of 2020, the National Bureau of Statistics said Monday. The drop narrowed by 4 percentage points from the first four months. The investment in the primary industry stayed unchanged from the same period last year, while that in the secondary and tertiary industries fell 11.8% and 3.9%, respectively. Euro area trade surplus plunged to a seasonally adjusted EUR 1.2 billion in April from EUR 25.5 billion in March, amid coronavirus pandemic, data from Eurostat showed Monday. This was the lowest since October 2011. Exports and imports decreased by a record 24.5% and 13% on month, respectively in April. On a yearly basis, exports were down 29.3% and imports decreased 24.8% in April. The unadjusted trade surplus was EUR 2.9 billion versus EUR 15.5 billion in the same period last year.

**Global Equities:** US stocks saw good buying support as steady economic cues lifted the sentiments. The Dallas Federal Reserve Bank President Robert Kaplan noted that economy will be in disinflationary mode the next couple of years, boosting hopes of continued monetary boost.

**Indian Economy:** India's exports contracted 36.47% in May to \$19.05 billion on weak global demand due to COVID-19, leading to significant drop in shipments by key sectors like engineering, petroleum and textiles, as per a government data. The imports contracted for the third straight month. Imports also saw a sharp slide of 51% \$22.2 billion in May, leaving a trade deficit of \$3.15 billion, compared to \$15.36 billion in the same month previous year.

**Equity Markets:** Domestic equity barometers slumped on Monday, as fears of a second wave of COVID-19 infections sent jitters across global stock markets. The barometer S&P BSE Sensex tumbled 552.09 points or 1.63% at 33,228.80. The Nifty 50 index lost 159.20 points or 1.6% at 9,813.70. Private banks tumbled while most PSU banks ended higher. The Nifty index pared losses in afternoon trade amid bargain hunting and managed to close above 9800 mark.

**Corporate News:** Tata Motors Ltd (TML) reported consolidated net loss of Rs 9,894 crore for the March quarter on the back of a steep fall in vehicle sales. The company had posted net profit of Rs 1,117 crore in the year-ago period. The company has made a provision for impairment of passenger vehicle (PV) business as an exceptional item of Rs 1,419 crore in its financial statement. TML's consolidated revenue from operations for Q4 was at Rs 62,493 crore, down 28% year-on-year (YoY). A rebound in crude oil prices could keep a tab on local oil marketing companies today. WTI Crude soared nearly 2% in US trades. Tata Power's renewable energy arm Tata Power Renewable Energy has received an order from Gujarat Urja Vikas Nigam to develop a 120 megawatt solar project in Gujarat. HPCL, NMDC, Bhansali Engineering Polymers, Bliss GVS Pharma, Globus Spirits, Ipca Laboratories, Bank of Maharashtra will be in focus ahead of latest earnings today.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	65.1	293.0	100.4
MF(INR cr)	1,011.5	(434.8)	(123.2)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	2,958	32,768	48,217
F&O(INR cr)	1,202,860	1,536,608	1,300,375

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	36.1	29.0	34.8
NSE VIX	32.6	30.1	38.3

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,913	(3.6) %	9.4 %	Energy	13,815	(0.3) %	28.3 %
IT	14,397	(0.0) %	19.5 %	Pharma	9,989	0.1 %	42.2 %
Metals	1,929	(1.9) %	24.1 %	Finance	9,818	(2.9) %	9.8 %
Auto	6,443	(1.8) %	38.3 %	PSU	1,372	1.4 %	6.9 %
FMCG	28,702	(1.5) %	8.9 %	Real Estate	199	(3.0) %	15.3 %

### 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>
Oracle Fin	2,745	6.5 %	42.9 %	IndusInd B	491	(7.2) %	43.3 %
Lupin	944	3.5 %	63.0 %	Tata Motor	42	(6.0) %	40.2 %
Adani Tran	210	3.5 %	10.7 %	DLF	146	(5.3) %	10.1 %
GAIL (Indi	100	3.4 %	31.6 %	Bandhan Ba	269	(5.2) %	37.8 %
Wipro	214	2.8 %	12.8 %	Tata Motor	101	(4.6) %	47.9 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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