



17 May.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,678	(0.1) %	(1.3) %
BSE SENSEX	48,733	0.1 %	(2.6) %
CNX BANK	32,170	(0.9) %	(5.0) %
CNX MIDCAP	24,364	(1.6) %	1.0 %
CNX SMALLCAP	8,759	(1.5) %	5.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,382	1.1 %	12.3 %
S&P 500	4,174	1.5 %	11.1 %
FTSE 100	7,044	1.2 %	7.2 %
HANG SENG	28,028	1.1 %	2.0 %
NIKKEI	28,084	2.3 %	3.0 %
SHANGHAI COMPOSITE	3,490	1.8 %	(0.4) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.53	0.2 %	0.8 %
EUR/USD	1.21	(0.6) %	(1.5) %
GBP/USD	1.40	(0.6) %	2.9 %
USD/JPY	109.58	0.8 %	6.2 %
USD/AUD	1.30	1.5 %	(0.2) %
USD/SGD	1.33	0.6 %	0.9 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	2.4 %	37.3 %
Gold(INR/10g)	47,569	0.0 %	(6.7) %
Gold Comex(USD/oz)	1,847	1.1 %	(5.2) %
SILVER(INR/1Kg)	69,875	0.0 %	1.5 %
Aluminium(USD/MT)	2,438	0.6 %	21.1 %
Copper(USD/MT)	10,212	(0.4) %	29.0 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.0) %	0.7 %

**Global Economy:** The US Commerce Department said retail sales were unchanged in April after soaring by an upwardly revised 10.7% in March. The US Federal Reserve on said industrial production climbed by 0.7% in April after soaring by an upwardly revised 2.4% in March. Consumer sentiment in the US deteriorated in the month of May, according to preliminary data released by the University of Michigan on Friday. The report showed the consumer sentiment index dropped to 82.8 in May from 88.3 in April. The European Central Bank policymakers are looking forward to review the Eurozone economic and inflation outlook, and the duration to continue stimulus in the monetary policy session in June, the minutes of the latest rate-setting session of the European Central Bank showed Friday.

Net asset purchases has hit the highest monthly purchase volume since July 2020, reflecting a marked increase versus average purchases in the first two months of this year, the ECB said. The sharp increase was despite the policy decision being taken mid-March. Japan's new vehicle sales rebounded by over 29% to 349,895 units in April 2021 from weak year-earlier sales of 270,393 units, according to registration data released by the Japan Automobile Manufacturers Association.

**Global Equities:** The US stocks continued to surge as bargain buying supported sentiments after heavy losses in last week. The DOW jumped 1.1% on the day.

**Indian Economy:** India's exports in April 2021 came in at \$30.63 billion, as compared to \$10.36 billion in April 2020, exhibiting a growth of 195.72%. In Rupee terms, exports were Rs. 2,28,071.76 crore in April 2021, as compared to Rs 78,951.41 crore in April last year. As compared to April 2019, exports in April 2021 exhibited a positive growth of 17.62% in Dollar terms and 26.17% in Rupee terms. India's trade deficit more than doubled to \$15.10 billion, the latest data showed.

**Equity Markets:** Equity indices ended near flat line on Friday. The Nifty closed below the 14,700 mark. Barring the Nifty FMCG index, all the sectoral indices on the NSE were in the red. Metal shares corrected sharply.

**Corporate News:** Larsen & Toubro reported higher consolidated profit at Rs 3,293 crore in Q4FY21 against Rs 3,197 crore in Q4FY20. The company's revenue spiked to Rs 48,087.9 crore from Rs 44,245.3 crore YoY. Cipla reported consolidated profit at Rs 411.5 crore in Q4FY21, marking an impressive surge against Rs 239 crore in Q4FY20. Its revenue rose to Rs 4,606.4 crore from Rs 4,376 crore YoY. IT stocks could be in focus following sustained gains in the Indian Rupee. The Rupee hit a near two month high of 73.22 per US dollar in last session.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(159.8)	(55.3)	(77.3)
MF(INR cr)	1.2	(60.6)	180.1

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	91,275	75,887	72,675
F&O(INR cr)	2,540,178	4,295,322	4,546,191

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.1	20.5	18.4
NSE VIX	20.3	21.3	21.6

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,170	(0.9) %	(5.0) %	Energy	18,653	(0.3) %	0.7 %
IT	25,588	(1.0) %	(1.5) %	Pharma	13,886	(1.3) %	12.2 %
Metals	5,091	(3.8) %	21.5 %	Finance	15,412	(0.6) %	(3.1) %
Auto	9,810	(2.0) %	(2.1) %	PSU	2,194	(2.0) %	(0.9) %
FMCG	34,782	2.1 %	(0.3) %	Real Estate	300	(3.2) %	(10.5) %

## 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>
Asian Pain	2,775	8.5 %	8.7 %	NMDC	186	(8.5) %	34.2 %
UPL	743	7.5 %	13.7 %	DLF	251	(5.6) %	(14.1) %
ITC	212	4.4 %	(3.5) %	GAIL (Indi	153	(5.2) %	9.0 %
Adani Gree	1,088	3.6 %	(6.2) %	Adani Ente	1,220	(5.1) %	10.2 %
Nestle Ind	17,224	3.0 %	0.8 %	Adani Tran	1,143	(5.0) %	14.4 %

## 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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