



17 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,914	0.0 %	20.1 %
BSE SENSEX	33,605	1.1 %	18.5 %
CNX BANK	20,297	0.0 %	11.5 %
CNX MIDCAP	14,231	0.0 %	24.1 %
CNX SMALLCAP	4,405	0.0 %	24.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,290	2.0 %	(7.9) %
S&P 500	3,125	1.9 %	(3.3) %
FTSE 100	6,243	2.9 %	(17.9) %
HANG SENG	24,344	2.4 %	(14.7) %
NIKKEI	22,582	4.9 %	(2.7) %
SHANGHAI COMPOSITE	2,932	1.4 %	(5.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.82	0.2 %	6.5 %
EUR/USD	1.13	0.2 %	0.8 %
GBP/USD	1.26	0.4 %	(4.3) %
USD/JPY	107.38	0.1 %	(1.2) %
USD/AUD	1.45	(0.9) %	1.4 %
USD/SGD	1.39	(0.0) %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	37	2.4 %	(39.3) %
Gold(INR/10g)	47,374	1.2 %	21.5 %
Gold Comex(USD/oz)	1,737	0.0 %	12.6 %
SILVER(INR/1Kg)	47,666	2.1 %	3.5 %
Aluminium(USD/MT)	1,574	1.8 %	(11.2) %
Copper(USD/MT)	5,760	2.0 %	(6.6) %

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: The US Federal Reserve Chair Jerome Powell acknowledged recent signs of improvement in the economy during congressional testimony on Tuesday but cautioned that significant uncertainty remains about the timing and strength of the recovery. The Fed said industrial production jumped by 1.4% in May after plummeting by a downwardly revised 12.5% in April. The US retail sales soared by 17.7% in May after plunging by a revised 14.7% in April. German ZEW economic sentiment indicator rose to 63.4 from 51 in May. The index has improved steadily after plummeting to -49.5 in March as the Covid-19 pandemic began spreading in Europe. UK unemployment rate was 3.9% in the three months to April, which was unchanged from the previous quarter, preliminary data from the Office for National Statistics showed. A year ago, the unemployment rate was 3.8%. The annual growth in average earnings including bonus slowed sharply to 1% from 2.3% in the January to March quarter. Annual growth in average earnings excluding bonus eased to 1.7% from 2.7%. Bank of Japan Policy Board voted 8-1 to retain the interest rate at -0.1% on current accounts that financial institutions maintain at the central bank. The bank will continue to purchase a necessary amount of Japanese government bonds without setting an upper limit so that 10-year JGB yields will remain at around zero percent. The central bank has raised the size of the coronavirus lending program to JPY 110 trillion from JPY 75 trillion. Australia house prices were up 1.6% on quarter in the first quarter of 2020, the Australian Bureau of Statistics said on Tuesday, following the 3.9% gain in the three months prior. On a yearly basis, house prices climbed 7.4% following the 2.5% increase in the previous three months.

Global Equities: US stocks surged for third session as US Federal Reserve Chairman Jerome Powell who suggested more fiscal stimulus may be needed before the American economy can make a full recovery from the COVID-19 pandemic.

Indian Economy: As per the data released by the Reserve Bank of India, India's services exports declined 8.9% to \$16.45 billion in April 2020 over April 2019. Meanwhile, India's services imports dipped 18.4% to \$9.30 billion in April 2020. India's services trade surplus improved 7.3% to \$7.15 billion in April 2020 from \$6.66 billion in April 2019. The government of India has announced the sale (issue/re-issue) of four dated securities for Rs 30000 crore. These include 5.09% GS 2022 3,000 June 19, 2020, 5.79% GS 2030 18,000, New GOI FRB 2033 (maturing on Sep 22, 2033) 4,000 and 7.19% GS 2060 5,000. According to the National Weather Forecasting Centre/Regional Meteorological Centre, New Delhi of the India Meteorological Department (IMD), Southwest Monsoon has further advanced.

Equity Markets: Domestic shares advanced on Tuesday amid high volatility as strong global cues boosted sentiment while India-China faceoff in Ladakh capped gains. The barometer S&P BSE Sensex gained 376.42 points or 1.13% at 33,605.22. The Nifty 50 index rose 100.30 points or 1.02% at 9,914.

Corporate News: Wipro said that Wipro Gallagher Solutions partnered with DocMagic to enhance digital mortgage processes. Soaring crude oil prices could keep the local oil marketing companies' shares under pressure. HCL Technologies commenced operations in Sri Lanka to leverage the country's IT workforce. Pidilite Industries, Indraprastha Gas, Muthoot Finance, REC, Aban Offshore, Clariant Chemicals, Cummins India, Fortis Healthcare, Gulf Oil Lubricants, HEG will be in focus ahead of latest earnings today.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(349.9)	234.5	90.8
MF(INR cr)	1,483.6	(387.6)	(113.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	3,888	30,362	47,313
F&O(INR cr)	1,692,244	1,549,578	1,308,372

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	34.4	29.5	34.8
NSE VIX	33.0	30.4	38.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,297	1.9 %	11.5 %	Energy	13,781	(0.3) %	27.9 %
IT	14,451	0.4 %	20.0 %	Pharma	9,926	(0.6) %	41.3 %
Metals	1,956	1.4 %	25.9 %	Finance	10,090	2.8 %	12.8 %
Auto	6,451	0.1 %	38.5 %	PSU	1,359	(0.9) %	5.9 %
FMCG	28,575	(0.4) %	8.4 %	Real Estate	197	(0.8) %	14.4 %

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	2,883	5.0 %	50.1 %	Tata Motor	95	(5.7) %	39.4 %
HDFC Bank	990	4.3 %	19.4 %	Tata Motor	40	(5.7) %	32.2 %
Godrej Con	634	4.2 %	15.6 %	Vodafone I	10	(3.9) %	219.7 %
H D F C	1,822	4.0 %	15.1 %	Bharti Inf	216	(3.1) %	39.3 %
ICICI Bank	343	3.6 %	10.2 %	Tech Mahin	533	(2.8) %	4.3 %

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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