



17 Jun.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,361	(2.1) %	(13.1) %
BSE SENSEX	51,496	(2.0) %	(13.1) %
CNX BANK	32,617	(2.2) %	(12.2) %
CNX MIDCAP	26,180	(2.3) %	(13.1) %
CNX SMALLCAP	8,313	(3.4) %	(21.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,927	(2.4) %	(17.6) %
S&P 500	3,667	(3.3) %	(23.1) %
FTSE 100	7,045	(3.1) %	(6.1) %
HANG SENG	20,845	(2.2) %	(10.4) %
NIKKEI	26,431	0.4 %	(9.8) %
SHANGHAI COMPOSITE	3,285	(0.6) %	(9.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	77.89	0.0 %	4.8 %
EUR/USD	1.04	0.1 %	(8.2) %
GBP/USD	1.21	(0.0) %	(10.7) %
USD/JPY	134.56	(0.1) %	16.9 %
USD/AUD	1.44	(0.5) %	4.7 %
USD/SGD	1.39	(0.1) %	3.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	119	(1.7) %	54.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,834	0.8 %	1.1 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,580	(0.3) %	(8.4) %
Copper(USD/MT)	9,257	(0.4) %	(4.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.3	(0.1) %	1.7 %

Global Economy: A report released by the Commerce Department showed new residential construction in the U.S. plunged by much more than expected in the month of May. Housing starts tumbled by 14.4 percent to an annual rate of 1.549 million in May after jumping by 5.5 percent to a revised rate of 1.810 million in April. The report also showed building permits slumped by 7.0 percent to an annual rate of 1.695 million in May after falling by 3.0 percent to a revised rate of 1.823 million in April. The Labor Department released a report showing a modest decrease in first-time claims for U.S. unemployment benefits in the week ended June 11th. The report showed initial jobless claims edged down to 229,000, a decrease of 3,000 from the previous week's revised level of 232,000. The report also showed continuing claims, a reading on the number of people receiving ongoing unemployment benefits, inched up by 3,000 to 1.312 million in the week ended June 4th. The Bank of England raised its key interest rate by a quarter basis point to the highest level since the global financial crisis in 2009, as inflationary pressures intensified amid the labor market tightness. The Monetary Policy Committee raise the bank rate by 25 basis points to 1.25 percent. The jobless rate in Australia came in at a seasonally adjusted 3.9 percent in May, the Australian Bureau of Statistics reported- unchanged from the April reading.

Global Indices: The Dow is down 812.81 points or 2.7 percent at 29,855.72, the Nasdaq is down 460.79 points or 4.2 percent at 10,638.37 and the S&P 500 is down 127.05 points or 3.4 percent at 3,662.94.

Indian Economy: The job market in India appears to be improving, with 63% of employers aiming to hire more people in the next three months in order to speed up the recovery and maintain economic development, according to the ManpowerGroup Employment Outlook Survey. The labour market is showing signs of strength in the third quarter (July-September) of 2022 with a Net Employment Outlook of 51%, which is the highest in 8 years. For the September quarter, 63% intend to raise their personnel levels, 12% expect to reduce hiring intent, and 24% expect no change, resulting in a seasonally adjusted Net Employment Outlook of 51%. Employers expect significant demand for talent across key areas, according to the poll, with digital roles driving the most demand. IT & Technology had the best prospects (68%) followed by Banking, Finance, Insurance, and Real Estate (60%), Other Services (52%), Restaurants and Hotels (48%), and Manufacturing (48%).

Equity Market: The barometer index, the S&P BSE Sensex, tumbled 1,045.60 points or 1.99% to 51,495.79. The Nifty 50 index tumbled 331.55 points or 2.11% to 15,360.60.

Corporate News: Eros Investments, a leading Global Media, Entertainment & Technology portfolio of ventures announced that it has signed an alliance agreement with Wipro to evolve and scale the Artificial Intelligence (AI) and Machine Learning (ML) based content localization solution. RITES has secured a business for operation and maintenance of 20 numbers of shunting locomotives for the period of 10 years from Container Corporation of India Limited for Rs. 364.56 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(430.1)	(318.9)	(248.9)
MF(INR cr)	32.3	942.6	1,219.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	51,077	47,450	58,313
F&O(INR cr)	25,143,851	11,103,508	10,583,300

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.6	27.1	26.8
NSE VIX	22.9	20.8	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	32,617	(2.2) %	(12.2) %	Energy	24,370	(2.0) %	(7.9) %
IT	27,136	(2.4) %	(25.3) %	Pharma	12,067	(1.6) %	(11.1) %
Metals	4,721	(5.2) %	(27.1) %	Finance	15,002	(2.2) %	(14.1) %
Auto	10,957	(2.2) %	2.6 %	PSU	2,387	(2.7) %	(15.8) %
FMCG	36,621	(0.6) %	(0.2) %	Real Estate	378	(2.8) %	(20.4) %

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>
Adani Tran	2,125	3.3 %	(12.3) %	Vedanta	267	(8.2) %	(34.1) %
Avenue Sup	3,683	0.5 %	(9.8) %	Tata Steel	902	(6.0) %	(31.5) %
Nestle Ind	16,874	0.4 %	(3.9) %	Hindalco I	336	(6.0) %	(41.1) %
Indus Towe	207	0.2 %	(6.7) %	Coal India	180	(5.3) %	(3.4) %
Britannia	3,390	0.1 %	4.9 %	NMDC	108	(5.3) %	(35.2) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Foreign Securities Purchases	17-06-2022	18:00	CAD	-	-
Italian Trade Balance	17-06-2022	13:30	EUR	-	-
Final CPI y/y	17-06-2022	14:30	EUR	-	0.081
ECOFIN Meetings	17-06-2022	All Day	EUR	-	-
Retail Sales m/m	17-06-2022	11:30	GBP	-	0.014
MPC Member Tenreyro Speaks	17-06-2022	14:00	GBP	-	-
MPC Member Pill Speaks	17-06-2022	20:00	GBP	-	-
BOJ Press Conference	17-06-2022	Tentative	JPY	-	-
BusinessNZ Manufacturing Index	17-06-2022	04:00	NZD	-	51.2
Fed Chair Powell Speaks	17-06-2022	18:15	USD	-	-
Capacity Utilization Rate	17-06-2022	18:45	USD	-	0.79
CB Leading Index m/m	17-06-2022	19:30	USD	-	(0.003)

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