



18 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,137	(0.1) %	10.7 %
BSE SENSEX	31,098	(0.1) %	10.0 %
CNX BANK	18,834	(1.2) %	3.4 %
CNX MIDCAP	12,992	(0.2) %	13.3 %
CNX SMALLCAP	3,935	(0.0) %	11.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,685	0.3 %	(17.0) %
S&P 500	2,864	0.4 %	(11.4) %
FTSE 100	5,800	1.0 %	(23.7) %
HANG SENG	23,797	(0.1) %	(16.6) %
NIKKEI	20,037	0.6 %	(13.6) %
SHANGHAI COMPOSITE	2,868	(0.1) %	(7.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.02	0.3 %	5.4 %
EUR/USD	1.08	0.1 %	(3.6) %
GBP/USD	1.22	(0.4) %	(7.7) %
USD/JPY	107.19	0.1 %	(1.3) %
USD/AUD	1.55	0.0 %	9.0 %
USD/SGD	1.43	0.2 %	5.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	29	6.8 %	(51.9) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,766	0.6 %	14.4 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,433	(0.1) %	(19.2) %
Copper(USD/MT)	5,165	0.2 %	(16.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.6	0.0 %	(1.3) %

Global Economy: The US consumer sentiment index rose to 73.7 in May after plummeting to 71.8 in April. The unexpected increase by the headline index came as the current economic conditions index jumped to 83.0 in May from 74.3 in April. US industrial production plunged by 11.2% in April after tumbling by a revised 4.5% in March. The US Commerce Department said retail sales cratered by a record 16.4% in April after tumbling by a revised 8.3% in March. China's industrial production grew 3.9% from the last year, reversing a 1.1% fall in March. Retail sales fell 7.5% on a yearly basis, slower than the 15.8 percent increase seen in March while fixed asset investment dropped 10.3% in January to April period after falling 16.1% in January to March. The urban jobless rate advanced to 6 percent in April from 5.9% in March. German economy contracted at the fastest pace since the global financial crisis in 2008-09 in the first quarter, as the nationwide lockdown to contain the coronavirus spread weighed on consumption and overseas demand, pushing the economy into a recession. Gross domestic product fell 2.2% sequentially.

Global Equities: US stocks saw volatile moves on Friday but ended marginally higher.

Indian Economy: India's merchandise exports dipped 60.3% to US\$ 10.36 billion in April 2020 over a year ago. Meanwhile, merchandise imports also declined 58.6% to US\$ 17.12 billion. The trade deficit fell 55.9% to US\$ 6.76 billion in April 2020 from US\$ 15.33 billion in April 2019. Finance Minister Nirmala Sitharaman provided the details of third tranche of economic package focusing on agriculture and allied activities - fisheries, animal husbandry, dairy, etc. FM announces Rs 1 lakh crore agri infrastructure fund for Farmer Producer Organizations, aggregators, primary agriculture cooperative societies for strengthening farm-gate infrastructure such as cold chains, post harvest management infrastructure.

Equity Markets: Key equity indices ended a volatile session on a flat note on Friday. Banks stocks extended losses while metals stocks bucked trend. Global shares were upbeat as data showed China's industrial output bouncing back in April. The barometer S&P BSE Sensex fell 25.16 points or 0.08% at 31,097.73. The Nifty 50 index lost 5.90 points or 0.06% at 9,136.85.

Corporate News: Reliance Industries Ltd (RIL) said growth equity firm General Atlantic Partners will invest Rs 6,598.38 crore in Jio Platforms, the fourth major deal in a little less than four weeks from leading global tech investors that will infuse a total Rs 67,194.75 crore in the digital unit of India's largest private company. Finance Minister Nirmala Sitharaman focussed on eight sectors in third tranche of economic package—coal, minerals, defence production, civil aviation, power distribution, social infrastructure, space and atomic energy. An easing of limits on foreign direct investment in defence manufacturing, privatisation of six more airports, opening up of more airspace and allowing private sector in commercial coal mining were among key announcements. The government will bring in commercial mining in the country's coal sector and that the government monopoly in coal mining will be removed. Finance Minister Nirmala Sitharaman provided the details of the fifth tranche of economic package on Sunday. The FM announced a hike in the allocation to the Mahatma Gandhi Rural Employment Guarantee Scheme (MGNREGA) by Rs 40,000 crore. The FM also said there will be a maximum of four PSUs in strategic sectors, and state-owned firms in other segments will eventually be privatised.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(314.0)	241.0	75.9
MF(INR cr)	(194.9)	(306.2)	(400.6)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	45,650	54,266	51,113
F&O(INR cr)	561,886	1,207,681	1,170,007

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.9	32.8	38.3
NSE VIX	38.0	39.4	43.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	18,834	(1.2) %	3.4 %	Energy	12,615	1.0 %	17.1 %
IT	13,196	(0.7) %	9.6 %	Pharma	9,093	(0.9) %	29.4 %
Metals	1,743	1.6 %	12.2 %	Finance	9,292	(0.7) %	3.9 %
Auto	5,746	(1.0) %	23.4 %	PSU	1,186	(1.6) %	(7.6) %
FMCG	26,959	0.1 %	2.3 %	Real Estate	173	(1.5) %	0.2 %

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>
Vedanta	93	4.3 %	48.4 %	M & M	381	(4.8) %	39.7 %
General In	136	4.0 %	29.2 %	Ashok Leyl	47	(4.4) %	14.7 %
New India	121	3.6 %	14.5 %	Godrej Con	544	(3.7) %	(1.0) %
Siemens	1,083	3.2 %	(0.2) %	Bank of Ba	42	(3.6) %	(18.8) %
Hind.Zinc	193	3.1 %	20.1 %	Bharti Inf	203	(3.4) %	30.6 %

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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