



18 Jun.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,881	0.0 %	19.7 %
BSE SENSEX	33,508	(0.3) %	18.5 %
CNX BANK	20,202	0.0 %	10.9 %
CNX MIDCAP	14,247	0.0 %	24.2 %
CNX SMALLCAP	4,427	0.0 %	25.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,120	(0.7) %	(8.5) %
S&P 500	3,113	(0.4) %	(3.6) %
FTSE 100	6,253	0.2 %	(17.8) %
HANG SENG	24,481	0.6 %	(14.2) %
NIKKEI	22,456	(0.6) %	(3.2) %
SHANGHAI COMPOSITE	2,936	0.1 %	(4.8) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.97	0.4 %	6.7 %
EUR/USD	1.12	(0.2) %	0.3 %
GBP/USD	1.26	0.1 %	(4.8) %
USD/JPY	107.24	(0.1) %	(1.3) %
USD/AUD	1.45	(0.5) %	1.8 %
USD/SGD	1.39	0.0 %	3.5 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	38	2.3 %	(38.0) %
Gold(INR/10g)	47,202	(0.4) %	21.0 %
Gold Comex(USD/oz)	1,740	0.2 %	12.8 %
SILVER(INR/1Kg)	47,973	0.6 %	4.2 %
Aluminium(USD/MT)	1,578	0.3 %	(11.0) %
Copper(USD/MT)	5,734	(0.4) %	(7.0) %

## 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 housing starts jumped by 4.3% to an annual rate of 974,000 in May after plummeting by 26.4 percent to a revised rate of 934,000 in April. New construction of multi-family homes led the rebound in housing starts, surging by 15% to a rate of 299,000 in May following a 33.2% crash in April. The US building permits spiked by 14.4% to an annual rate of 1.220 million in May after plunging by 21.4% to a revised rate of 1.066 million in April. Eurozone inflation eased lower close to stagnation in May, as initially estimated, to the lowest since June 2016, final data from Eurostat showed on Wednesday. Inflation slipped to 0.1% from 0.3% in April. This was in line with the estimate published on May 29. Headline inflation remained well below the European Central Bank's target of "below, but close to 2%." Europe's car registrations continued to fall sharply in May, as the coronavirus, or Covid-19, pandemic hurt demand and production, the European Automobile Manufacturers Association, or ACEA, reported on Wednesday. Passenger car sales declined 52.3% year-on-year in May, following a 76.3% fall in April. UK consumer price inflation eased to 0.5% in May, from 0.8% in April, the Office for National Statistics showed Wednesday. This was the lowest since June 2016, when a similar 0.5% was reported. On a monthly basis, consumer prices remained unchanged after easing 0.2% in April. Core inflation slowed to 1.2% from 1.4% in April. Japan merchandise trade deficit came in at 833.388 billion yen in May, the Ministry of Finance said on Wednesday, down 13.7% on year, following the 930 billion yen deficit in April. Exports were down 28.3% on year to 4.184 trillion yen, following the 21.9% drop in the previous month. Imports tumbled an annual 26.2% to 5.018 trillion yen after sinking 7.2% a month earlier. Australia Westpac- Melbourne Institute Leading Index which indicates the likely pace of economic activity relative to trend three to nine months into the future, rose to -4.79% in May from -5.08% in April.

**Global Equities:** US stocks turned lower amid ongoing rise in COVID-19 infections across parts of the US that threatened to slow the pace of economic reopening. Federal Reserve Chair Jerome Powell yet again stated that continued support will be required till it is sure the US economy is through these troubled times.

**Indian Economy:** The Supreme Court (SC) on Wednesday, while hearing the plea challenging the levy of interest on loan repayments during the moratorium, said there is no merit in burdening customers, who have opted for the RBI-approved loan moratorium, with additional interest. The SC bench said the government cannot leave everything to be decided by banks. In conclusion, the bench asked the government to interfere in the matter soon and find a way to waive off additional interest during the moratorium. The matter will be heard next in the first week of August.

**Equity Markets:** Key domestic benchmarks ended the volatile session with modest losses on Wednesday. Geopolitical tension between India and China resulted in market weakness. Investors were also worried about the rising number of coronavirus cases and deaths in India. The barometer S&P BSE Sensex declined 97.30 points or 0.29% at 33,507.92. The Nifty 50 index fell 32.85 points or 0.33% at 9,881.15.

**Corporate News:** Cummins India reported around 9% spurt in its consolidated net profit to Rs 170.24 crore in the March quarter compared to the same period last year. However, total income of the company dropped to Rs 1,129.41 crore in the March quarter from Rs 1,408.98 crore in the same period year ago. Bajaj Auto said it has clocked a compound annual growth rate (CAGR) of 10% in the last ten years, with revenue shooting up to Rs 29,919 crore in 2019-20.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(195.0)	198.7	84.9
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)	3,468	28,293	46,436
F&O(INR cr)	1,668,055	1,558,691	1,315,566

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.7	29.9	34.8
NSE VIX	33.4	30.6	38.1

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,202	(0.5) %	10.9 %	Energy	13,743	(0.3) %	27.6 %
IT	14,478	0.2 %	20.2 %	Pharma	9,977	0.5 %	42.0 %
Metals	1,940	(0.8) %	24.9 %	Finance	10,007	(0.8) %	11.9 %
Auto	6,504	0.8 %	39.6 %	PSU	1,353	(0.4) %	5.4 %
FMCG	28,432	(0.5) %	7.9 %	Real Estate	198	0.8 %	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>
Motherson	97	5.8 %	67.6 %	HDFC AMC	2,416	(4.9) %	10.5 %
General In	155	5.7 %	47.2 %	Bharti Inf	206	(4.5) %	33.0 %
Maruti Suz	5,726	4.1 %	34.8 %	Avenue Sup	2,340	(2.6) %	12.4 %
New India	128	3.4 %	21.4 %	Kotak Mah.	1,244	(2.6) %	5.3 %
Bharti Air	563	3.4 %	33.7 %	Shree Ceme	21,635	(2.2) %	30.7 %

### 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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