



19 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	8,823	0.0 %	6.9 %
BSE SENSEX	30,029	(3.4) %	6.2 %
CNX BANK	17,573	0.0 %	(3.5) %
CNX MIDCAP	12,409	0.0 %	8.2 %
CNX SMALLCAP	3,805	0.0 %	7.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,597	3.9 %	(13.8) %
S&P 500	2,954	3.2 %	(8.6) %
FTSE 100	6,049	4.3 %	(20.5) %
HANG SENG	23,935	0.6 %	(16.1) %
NIKKEI	20,134	0.5 %	(13.2) %
SHANGHAI COMPOSITE	2,875	0.2 %	(6.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.16	0.5 %	5.6 %
EUR/USD	1.09	0.5 %	(3.2) %
GBP/USD	1.21	(0.5) %	(7.9) %
USD/JPY	107.28	0.2 %	(1.3) %
USD/AUD	1.54	(0.6) %	8.3 %
USD/SGD	1.42	(0.0) %	5.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	32	8.1 %	(48.0) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,754	(0.7) %	13.7 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,442	0.6 %	(18.7) %
Copper(USD/MT)	5,250	1.6 %	(14.9) %

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	0.1 %	(1.2) %

Global Economy: China's home prices rose in April suggesting that the property market started gradual recovery. Out of 70 cities, house prices increased in 50 compared to 38 cities in March, data published by the National Bureau of Statistics showed Monday. According to preliminary estimate, house prices in first-tier cities rose 0.2%. The sales prices of newly built commercial housing in 31 second-tier cities rose by 0.5% month-on-month and that in 35 third-tier cities gained 0.6%. German economy is set to see a significant fall in the second quarter despite easing of coronavirus containment measures, the Bundesbank said in its monthly report. UK households' financial health remained under severe pressure in May as coronavirus pandemic took its toll on employment and income, survey results from IHS Markit showed Monday. The Household Finance Index, which measures households' overall perceptions of financial wellbeing, came in at 37.8 in May, up slightly from April's eight-and-a-half year low of 34.9. Japan's gross domestic product contracted by a seasonally adjusted 0.9% on quarter in the first quarter of 2020, the Cabinet Office said in Monday's preliminary report. This followed the 1.8% decline in the previous three months. On an annualized basis, GDP was down 3.4% following the downwardly revised 7.3% contraction in the three months before.

Global Equities: US equities rallied as investors showed optimism about a potential coronavirus vaccine from Moderna.

Indian Economy: With the government extending the nationwide lockdown up to May 31, the Reserve Bank of India (RBI) is likely to extend the moratorium on repayment of loans for three more months, according to an SBI research report. The Confederation of All India Traders (CAIT) on Monday expressed disappointment for not including specific measures for the 7-crore strong community of small traders in the recent economic package. In a letter to Finance Minister Nirmala Sitharaman, CAIT Secretary-General Praveen Khandelwal, sought measures to help traders tide over the impact of the lockdown.

Equity Markets: The market slumped on Monday amid broad-based selling pressure, with banks stocks losing the most. Unimpressive economic stimulus, rising cases of Covid-19 in India and extension of nationwide lockdown dented investors sentiment. The barometer S&P BSE Sensex tumbled 1,068.75 points or 3.44% at 30,028.98. The Nifty 50 index lost 313.60 points or 3.43% at 8,823.25.

Corporate News: IT stocks could extend their upmove on weak Indian Rupee. INR fell near 76 mark yesterday as heavy losses emerged in benchmark local stock indices even as global undertone stayed firm. India's largest cigarette maker ITC Ltd said its cigarette factories are progressively operating. Bharti Airtel on Monday reported a consolidated net loss after exceptional items of Rs 5,237 crore in the fourth quarter ended March 31, as compared to a net profit of Rs 107 crore in the corresponding period last year. However, consolidated revenues during the quarter grew by 15 per cent year-on-year (YoY) to Rs 23,723 crore, as against Rs. 20,602 crore in the January-March quarter last year. Soaring crude oil prices could weigh on the local oil marketing companies share prices.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(332.3)	177.3	60.2
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)	54,401	54,279	51,226
F&O(INR cr)	903,861	1,180,061	1,160,829

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.9	32.8	38.3
NSE VIX	40.9	39.5	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	17,573	(6.7) %	(3.5) %	Energy	12,215	(3.2) %	13.4 %
IT	13,314	0.9 %	10.5 %	Pharma	9,093	(0.0) %	29.4 %
Metals	1,674	(4.0) %	7.7 %	Finance	8,675	(6.6) %	(3.0) %
Auto	5,430	(5.5) %	16.6 %	PSU	1,116	(5.9) %	(13.0) %
FMCG	26,695	(1.0) %	1.3 %	Real Estate	163	(5.3) %	(5.1) %

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>
Cipla	600	5.3 %	45.1 %	Indiabulls	119	(10.9) %	19.7 %
TCS	1,946	2.8 %	13.9 %	Shriram Tr	576	(10.2) %	(7.3) %
Bharti Inf	207	2.3 %	33.5 %	IndusInd B	377	(10.0) %	10.1 %
Colgate-Pa	1,380	2.1 %	11.1 %	Zee Entert	150	(9.0) %	23.7 %
Lupin	857	1.8 %	48.0 %	H P C L	173	(8.8) %	(6.3) %

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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