



19 May.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,108	1.2 %	1.6 %
BSE SENSEX	50,193	1.2 %	0.3 %
CNX BANK	33,922	1.4 %	0.2 %
CNX MIDCAP	25,267	1.8 %	4.8 %
CNX SMALLCAP	9,000	1.6 %	8.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,061	(0.8) %	11.3 %
S&P 500	4,128	(0.6) %	9.9 %
FTSE 100	7,034	0.0 %	7.0 %
HANG SENG	28,594	1.4 %	4.1 %
NIKKEI	28,407	2.1 %	4.2 %
SHANGHAI COMPOSITE	3,529	0.3 %	0.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.18	(0.5) %	0.3 %
EUR/USD	1.21	0.6 %	(1.0) %
GBP/USD	1.41	0.3 %	3.2 %
USD/JPY	109.37	(0.2) %	6.0 %
USD/AUD	1.29	(0.6) %	(0.8) %
USD/SGD	1.33	(0.1) %	0.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(1.2) %	37.5 %
Gold(INR/10g)	47,569	0.0 %	(6.7) %
Gold Comex(USD/oz)	1,872	(0.1) %	(4.0) %
SILVER(INR/1Kg)	69,875	0.0 %	1.5 %
Aluminium(USD/MT)	2,468	0.5 %	22.6 %
Copper(USD/MT)	10,465	2.0 %	32.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.0) %	0.7 %

Global Economy: The Euro area economy re-entered recession in the first quarter, as initially estimated, due to the restrictions imposed to contain the spread of the Covid-19 pandemic. Gross domestic product contracted 0.6% from the fourth quarter, when GDP was down 0.7%, flash data from Eurostat revealed on Tuesday. The rate came in line with the estimate published on April 30. UK jobless rate fell 0.3 percentage points to 4.8% in the first quarter, the Office for National Statistics reported Tuesday. At the same time, the employment rate was estimated at 75.2%, up 0.2 percentage points from the previous quarter. Data showed that annual growth in average earnings, including bonuses, came in at 4.0 percent. In April, the claimant count rate held steady at 7.2%. The number of people claiming unemployment benefits decreased by 15,100 from March. Japan's gross domestic product shrank an annualized 5.1% in the first quarter of 2021, the Cabinet Office said in Tuesday's preliminary report, following the downwardly revised 11.6% increase in the previous three months (originally 11.7%). On a quarterly basis, GDP sank 1.3%, following the 2.8% increase in the three months prior. Japan's tertiary activity rose for the first time in four months in March, data from the Ministry of Economy, Trade and Industry showed on Tuesday. The tertiary activity index gained 1.1% month-on-month in March, after a 0.3% decrease in February. On a yearly basis, the tertiary activity index rose 0.5% in March, after a 5.6% fall in the previous month.

Global Equities: The US stocks saw mixed moves amid lack of economic cues. The overall sentiments were choppy.

Indian Economy: India has recorded daily recoveries of more than 4 lakh COVID patients in a single day for the first time. A total of 4,22,436 recoveries were registered on Monday. Average Daily Recovery of more than 3,55,944 cases has been recorded in the last 14 days. The graph below depicts the Daily Recoveries in the last 14 days. A total of 2,63,533 new cases were registered on Monday. The daily new COVID cases being registered in India are now less than 3 Lakhs consecutively for the second day. The index of mineral production of mining and quarrying sector for the month of February, 2021 (Base: 2011-12=100) at 116.5, was 5.5% lower as compared to the level in the month of February, 2020. The cumulative growth for the period April- February, 2020-21 over the corresponding period of previous year has been (-) 9.6%.

Equity Markets: The domestic equity barometers ended with strong gains on Tuesday, rising for the second consecutive session. The Nifty closed above the 15,100 mark. Private banks, financials, auto and metal shares advanced while FMCG and pharma shares corrected.

Corporate News: Tata Motors posted a consolidated loss at Rs 7,605.4 crore in the quarter ended March 2021 despite a sharp growth in revenue though on a low base. Asset write-downs and restructuring costs with respect to new JLR's strategy Reimagine - Rs 14,994.30 crore impacted the bottomline. The company had reported a consolidated loss of Rs 9,894.25 crore in the year-ago quarter and profit at Rs 2,906.45 crore in the December 2020 quarter. The company's consolidated revenue from operations soared by 42% year-on-year to Rs 88,627.9 crore in Q4FY21. Blue Star Ltd said it has incorporated a new wholly-owned subsidiary "Blue Star Climatech" to carry out manufacturing and deal in line with the mainline of business of the company.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(185.3)	(96.6)	(90.9)
MF(INR cr)	1.2	(60.6)	180.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	85,324	77,272	73,422
F&O(INR cr)	3,649,247	4,146,703	4,474,973

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.7	20.3	18.4
NSE VIX	19.2	21.0	21.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,922	1.4 %	0.2 %	Energy	19,202	1.9 %	3.7 %
IT	25,958	1.0 %	(0.1) %	Pharma	13,832	(0.2) %	11.8 %
Metals	5,294	1.7 %	26.4 %	Finance	16,140	1.5 %	1.5 %
Auto	10,324	3.2 %	3.0 %	PSU	2,249	(1.3) %	1.5 %
FMCG	34,741	(0.2) %	(0.4) %	Real Estate	307	0.8 %	(8.5) %

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>
M & M	798	5.9 %	(1.2) %	Godrej Con	816	(3.0) %	12.4 %
Avenue Sup	3,056	5.4 %	4.9 %	Bharti Air	536	(2.4) %	3.0 %
Jubilant F	2,964	5.3 %	0.5 %	Torrent Ph	2,724	(1.5) %	6.9 %
Bajaj Auto	4,067	5.2 %	8.7 %	Siemens	2,033	(1.4) %	9.4 %
H P C L	265	5.2 %	11.5 %	ITC	210	(1.2) %	(4.5) %

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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