



19 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,092	0.0 %	22.3 %
BSE SENSEX	34,208	2.1 %	21.6 %
CNX BANK	20,956	0.0 %	15.1 %
CNX MIDCAP	14,428	0.0 %	25.8 %
CNX SMALLCAP	4,493	0.0 %	26.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,080	(0.2) %	(8.6) %
S&P 500	3,115	0.1 %	(3.6) %
FTSE 100	6,224	(0.5) %	(18.2) %
HANG SENG	24,465	(0.1) %	(14.3) %
NIKKEI	22,355	(0.5) %	(3.7) %
SHANGHAI COMPOSITE	2,939	0.1 %	(4.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.98	0.2 %	6.7 %
EUR/USD	1.12	(0.6) %	0.1 %
GBP/USD	1.25	(1.1) %	(5.4) %
USD/JPY	106.90	(0.5) %	(1.6) %
USD/AUD	1.46	0.8 %	2.2 %
USD/SGD	1.39	0.1 %	3.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	39	2.3 %	(36.5) %
Gold(INR/10g)	47,302	0.2 %	21.3 %
Gold Comex(USD/oz)	1,734	(0.3) %	12.4 %
SILVER(INR/1Kg)	48,159	0.4 %	4.6 %
Aluminium(USD/MT)	1,587	0.6 %	(10.5) %
Copper(USD/MT)	5,799	1.1 %	(5.9) %

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	(0.0) %	(1.2) %

Global Economy: The US Conference Board said its leading economic index jumped by 2.8% in May after plunging by 6.1% in April and 7.5% in March. The US Labor Department said initial jobless claims dropped to 1.508 million, a decrease of 58,000 from the previous week's upwardly revised level of 1.566 million. Bank of England increased its quantitative easing programme and left its record low interest rate unchanged on Thursday. The monetary policy committee of the bank decided to lift the asset purchase programme by GBP 100 billion to GBP 745 billion. The nine-member committee unanimously decided to hold the interest rate at 0.10%. UK GDP contracted by around 20% in April, following a 6% fall in March. Evidence from more timely indicators suggests that GDP started to recover thereafter. Switzerland's central bank left the key interest rate unchanged at -0.75% said it remains willing to intervene more strongly in the foreign exchange market due to the high valuation for the Swiss franc. The expansionary monetary policy remains necessary to ensure appropriate monetary conditions in Switzerland. Australia unemployment rate came in at a seasonally adjusted 7.1% in May, the Australian Bureau of Statistics said on Thursday, up from the upwardly revised 6.4 percent in April. The Australian economy shed 227,700 jobs last month to 12,154,100 following the loss of 594,300 in the previous month. Full-time employment decreased 89,100 to 8,540,000 people and part-time employment decreased 138,600 to 3,614,100 people.

Global Equities: US stocks slipped further on worries over rising COVID-19 cases. The Dow and S&P had ended their three-day winning streak on Wednesday.

Indian Economy: Fitch Ratings has revised the Outlook on India's Long-Term Foreign-Currency Issuer Default Rating (IDR) to Negative from Stable and affirmed the rating at 'BBB-'. According to the rating agency, the coronavirus pandemic has significantly weakened India's growth outlook for this year and exposed the challenges associated with a high public-debt burden. Fitch expects economic activity to contract by 5% in the fiscal year ending March 2021 (FY21) from the strict lockdown measures imposed since 25 March 2020, before rebounding by 9.5% in FY22. The rebound will mainly be driven by a low-base effect. Securities and Exchange Board of India (SEBI) has relaxed the preferential allotment norms till March 2021. SEBI has allowed promoters to increase their stake in the company by up to 10% through a preferential allotment, against the limit of 5% earlier. Government of India has decided to launch a massive rural public works scheme 'Garib Kalyan Rojgar Abhiyaan' to empower and provide livelihood opportunities to the returnee migrant workers and rural citizens.

Equity Markets: Domestic shares ended with massive gains on Thursday. Excellent buying supported the local stocks amid expiry related activity even as the broad local economic undertone remained tepid.

Corporate News: Bajaj Consumer Care Ltd reported a 61% decline in consolidated net profit at Rs 23.29 crore for the fourth quarter ended March 2020. Total revenue dropped by 27.75 percent to Rs 178.76 crore. MOIL reported a sharp fall of over 90% in its consolidated net profit at Rs 13.47 crore for the quarter ended March 31, 2020, mainly on account of reduced income. Total income during the quarter under review fell 42% to Rs 282.96 crore. IRB Infrastructure Developers on Thursday said it has achieved the Rs 6,610 crore financial closure for its first and India's largest TOT (toll-operate-transfer) project 'Mumbai Pune Expressway'. Container Corporation of India has signed an agreement with a Russian Logistics Company which can facilitate export of tea to the CIS (Commonwealth of Independent States) countries.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	102.0	191.3	85.2
MF(INR cr)	527.4	(231.5)	(86.1)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	54,456	63,730	55,808
F&O(INR cr)	3,383,661	1,689,046	1,356,117

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.5	30.2	34.8
NSE VIX	31.5	30.7	38.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,956	3.7 %	15.1 %	Energy	14,023	2.0 %	30.2 %
IT	14,551	0.5 %	20.8 %	Pharma	9,975	(0.0) %	42.0 %
Metals	1,999	3.0 %	28.7 %	Finance	10,372	3.6 %	16.0 %
Auto	6,536	0.5 %	40.3 %	PSU	1,388	2.5 %	8.1 %
FMCG	28,649	0.8 %	8.7 %	Real Estate	200	0.9 %	16.3 %

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>
Bajaj Fins	5,428	7.8 %	20.6 %	ICICI Lomb	1,276	(4.4) %	15.4 %
Coal India	138	6.3 %	(1.3) %	Oracle Fin	2,737	(4.2) %	42.5 %
Zee Entert	174	5.7 %	44.3 %	NMDC	83	(3.5) %	5.1 %
Bajaj Fina	2,526	5.4 %	13.8 %	Pidilite I	1,391	(2.9) %	7.2 %
Vedanta	107	4.8 %	70.8 %	DLF	148	(1.6) %	11.4 %

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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