



20 May.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	8,889	0.1 %	7.7 %
BSE SENSEX	30,196	0.6 %	6.9 %
CNX BANK	17,487	0.0 %	(4.0) %
CNX MIDCAP	12,492	0.2 %	8.9 %
CNX SMALLCAP	3,815	0.1 %	7.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,207	(1.6) %	(15.2) %
S&P 500	2,923	(1.1) %	(9.5) %
FTSE 100	6,002	(0.8) %	(21.1) %
HANG SENG	24,388	1.9 %	(14.6) %
NIKKEI	20,433	1.5 %	(11.9) %
SHANGHAI COMPOSITE	2,899	0.8 %	(6.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.06	0.1 %	5.4 %
EUR/USD	1.09	1.1 %	(2.5) %
GBP/USD	1.22	0.6 %	(7.2) %
USD/JPY	107.64	0.4 %	(0.9) %
USD/AUD	1.53	(1.6) %	7.2 %
USD/SGD	1.42	(0.6) %	5.3 %

**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)	1,765	0.6 %	14.4 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,464	1.6 %	(17.4) %
Copper(USD/MT)	5,314	1.2 %	(13.8) %

**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) %

**Indian Equities:** Key benchmark indices ended with decent gains on Tuesday, tracking strength in other Asian peers amid optimism about a potential vaccine for the coronavirus. Domestic shares also witnessed bargain hunting after the Sensex and the Nifty lost about 6% in the past three session. However, gains were capped due to rising coronavirus cases in India.

**Corporate News:**

- Bajaj Finance's consolidated net profit declined 19% to Rs 948 crore on 36% increase in total income to Rs 7,231 crore in Q4 March 2020 over Q4 March 2019. On a consolidated basis, profit before tax (PBT) stood at Rs 1,278 crore in Q4 FY20, down by 29% from Rs 1,812 crore reported in Q4 FY19. Net interest income jumped 38% to Rs 4,684 crore in Q4 FY20 over Q4 FY19. Total operating expenses in the fourth quarter increased 25% to Rs 1,452 crore from Rs 1,164 crore in the corresponding period last year. New loans booked during Q4 FY20 increased by 3% to 6.03 million from 5.83 million in Q4 FY19.
- Tata Power Company's consolidated net profit surged 230.45% to Rs 402.59 crore on 1.37% fall in total income to Rs 7,953.73 crore in Q4 March 2020 over Q4 March 2019.
- Ujjivan Small Finance Bank's net profit rose 14.69% to Rs 73.15 crore on 34.44% rise in total income to Rs 809.65 crore in Q4 March 2020 over Q4 March 2019.
- Bajaj Auto, Dr Reddy's Laboratories and UltraTech Cement will declare their Q4 results today, 20 May 2020.

**Indian Economy:** The government of India (GoI) has announced the sale (issue /re-issue) of four dated securities for Rs 30000 crore. These include 5.09% GS 2022 3,000 May 22, 2020, 5.79% GS 2030 18,000, GOI FRB 2031 4,000 and 7.19% GS 2060 5,000. Auto industry body SIAM welcomed the "Aatma Nirbhar Bharat" package announced by the Finance Minister and appreciated its focus towards MSMEs; NBFCs and the Agri-sector. The Agri sector package may benefit the Auto sector indirectly in the medium term but the Indian Automotive industry needed an immediate stimulus to boost demand, which has not happened, it cautioned.

**Global Economy:** US Federal Reserve Chair Jerome Powell reaffirmed the central bank will provide more support to the economy. Testifying before the Senate Banking Committee, Powell said the central bank needs to be prepared to act further in terms of extended monetary stimulus if there is need for it. He reiterated his stance that more fiscal aid may be needed but stopped short of backing it up fully. US housing starts plummeted by 30.2% to an annual rate of 891,000 in April after tumbling by 18.6% in March. Europe's passenger car sales plunged 76.3 percent year-on-year in April, following a 55.1 percent fall in March, the European Automobile Manufacturers Association, or ACEA, reported Tuesday. In the first full month of Covid-19 restriction, car demand posted its biggest fall on record. UK jobless claims rose at a record pace in April as lockdown to contain the spread of coronavirus, or Covid-19, took its toll on labor market, data from the Office for National Statistics showed Tuesday. The number of jobless claims increased by a record 856,500 to hit 2.096 million in April. apan industrial production fell a seasonally adjusted 3.7% month-on-month in March, final data from the Ministry of Economy, Trade and Industry showed on Tuesday. Shipments fell 5.8% in March.

**Global Equities:** US stocks tumbled on hefty profit selling after gains in last session. Weak economic cues hurt the sentiments and the DOW crashed 1.6% on the day.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(332.2)	126.4	45.7
MF(INR cr)	(218.8)	(128.9)	(323.6)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	59,720	54,732	51,509
F&O(INR cr)	1,085,207	1,172,156	1,158,308

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.5	32.3	37.8
NSE VIX	39.5	39.5	42.9

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	17,486	(0.5) %	(4.0) %	Energy	12,248	0.3 %	13.7 %
IT	13,447	1.0 %	11.6 %	Pharma	9,085	(0.1) %	29.3 %
Metals	1,694	1.2 %	9.0 %	Finance	8,715	0.5 %	(2.5) %
Auto	5,486	1.0 %	17.8 %	PSU	1,087	(2.6) %	(15.3) %
FMCG	26,896	0.8 %	2.0 %	Real Estate	162	(0.7) %	(5.8) %

### 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>
Vodafone I	5	17.2 %	78.7 %	UPL	340	(9.6) %	11.1 %
Bharti Air	599	11.3 %	42.1 %	Hind.Zinc	174	(7.5) %	8.5 %
Adani Port	319	8.8 %	30.4 %	Oracle Fin	2,418	(6.5) %	25.9 %
O N G C	77	5.8 %	17.3 %	Bank of Ba	37	(5.4) %	(28.8) %
Bharti Inf	219	5.6 %	41.0 %	General In	124	(4.4) %	17.7 %

### 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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