



20 May.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,030	(0.5) %	1.1 %
BSE SENSEX	49,903	(0.6) %	(0.3) %
CNX BANK	33,685	(0.7) %	(0.5) %
CNX MIDCAP	25,233	(0.1) %	4.6 %
CNX SMALLCAP	9,052	0.6 %	9.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,896	(0.5) %	10.7 %
S&P 500	4,116	(0.3) %	9.6 %
FTSE 100	6,950	(1.2) %	5.8 %
HANG SENG	28,594	1.4 %	4.1 %
NIKKEI	28,044	(1.3) %	2.9 %
SHANGHAI COMPOSITE	3,511	(0.5) %	0.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.26	0.1 %	0.4 %
EUR/USD	1.21	0.0 %	(1.0) %
GBP/USD	1.41	0.1 %	3.4 %
USD/JPY	109.24	(0.1) %	5.9 %
USD/AUD	1.29	0.1 %	(0.7) %
USD/SGD	1.34	0.2 %	1.0 %

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 US Federal Reserve officials noted that the pick-up in inflation is transitory, according to the minutes of the Fed's April 27-28 meeting, released Wednesday. Participants also noted that the expected surge in demand as the economy reopens further, along with some transitory supply chain bottlenecks, would contribute to personal consumption expenditure based price inflation temporarily running somewhat above 2%. After the transitory effects of these factors fade, participants generally expected measured inflation to ease, the minutes showed. Eurozone inflation rose to 1.6% in April from 1.3% in March, driven by higher energy prices, final data from Eurostat showed on Wednesday. This was the highest rate since April 2019, when inflation was 1.7%. On a monthly basis, the harmonized index of consumer prices advanced 0.6% in April, as estimated. Meanwhile, core inflation that excludes energy, food, alcohol and tobacco, eased to 0.7% from 0.9% in the previous month. This was below the flash estimate of 0.8%. European new passenger car registrations jumped sharply in the first four months of the year and there was a surge of over 200 percent in the month of April alone due to the low base comparison of comparison last year as sales were hurt by the coronavirus pandemic. Japan's industrial production increased a seasonally adjusted 1.7% month-on-month in March, final data from the Ministry of Economy, Trade and Industry showed on Wednesday. In the initial estimate, industrial production rose 2.2%. Shipment grew 0.4% monthly in March. According to the initial estimate, shipment rose 0.8%. Inventories gained 0.4% in March versus 0.1% growth in the initial estimate.

Global Equities: The US stocks stayed slippery with benchmark indices coming under substantial pressure yet again.

Indian Economy: Shaktikanta Das, the governor of Reserve Bank of India (RBI) held meetings with the MD & CEOs of Public Sector Banks through video conference. The Governor acknowledged the important role being played by PSBs in extending various banking facilities including credit facilities to individuals and businesses while tackling the challenges brought on by the pandemic. He also urged the banks to continue focussing on steps to enhance the resilience of their balance sheets.

Equity Markets: The domestic equity barometers ended with steep losses after a volatile session on Wednesday. The Nifty, however, managed to hold the 15,000 mark. Private banks and auto shares corrected while pharma and media stocks were in demand.

Corporate News: Indian Oil Corporation reported sharply higher profit at Rs 8,781.3 crore in Q4FY21 against Rs 4,916.59 crore in Q3FY21 while its revenue increased to Rs 1,63,605.67 crore from Rs 1,46,598.83 crore YoY. The Centre on Wednesday hiked the subsidy on Di-ammonium Phosphate (DAP) fertiliser by 140%, costing the exchequer an additional Rs 14,775 crore, according to a PMO statement. Metal stocks could be in focus after a meltdown in COMEX Copper yesterday as the counter tanked more than 3%.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	156.1	(73.6)	(82.1)
MF(INR cr)	236.6	128.7	223.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	80,617	77,551	73,661
F&O(INR cr)	4,283,303	4,158,086	4,468,790

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.7	20.3	18.4
NSE VIX	19.3	20.8	21.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,685	(0.7) %	(0.5) %	Energy	19,308	0.6 %	4.3 %
IT	25,983	0.1 %	0.0 %	Pharma	14,001	1.2 %	13.1 %
Metals	5,246	(0.9) %	25.2 %	Finance	15,981	(1.0) %	0.5 %
Auto	10,249	(0.7) %	2.3 %	PSU	2,254	0.2 %	1.8 %
FMCG	34,730	(0.0) %	(0.4) %	Real Estate	314	2.1 %	(6.6) %

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>
Adani Tran	1,323	5.0 %	32.4 %	Tata Motor	314	(5.4) %	2.2 %
Adani Gree	1,244	3.7 %	7.2 %	Punjab Nat	36	(3.1) %	(5.2) %
Coal India	152	3.7 %	14.9 %	Adani Ente	1,295	(2.4) %	16.9 %
L & T Info	3,748	3.1 %	(8.9) %	NMDC	184	(1.7) %	33.2 %
H P C L	273	2.9 %	14.8 %	H D F C	2,460	(1.7) %	(2.8) %

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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