



20 Jun.2022

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,294	(0.4) %	(13.5) %
BSE SENSEX	51,360	(0.3) %	(13.4) %
CNX BANK	32,743	0.4 %	(11.9) %
CNX MIDCAP	25,878	(1.2) %	(14.1) %
CNX SMALLCAP	8,247	(0.8) %	(22.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,889	(0.1) %	(17.7) %
S&P 500	3,675	0.2 %	(22.9) %
FTSE 100	7,016	(0.4) %	(6.5) %
HANG SENG	21,075	1.1 %	(9.5) %
NIKKEI	25,963	(1.8) %	(11.4) %
SHANGHAI COMPOSITE	3,317	1.0 %	(8.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	77.86	0.0 %	4.7 %
EUR/USD	1.05	0.3 %	(7.6) %
GBP/USD	1.23	0.3 %	(9.4) %
USD/JPY	134.50	1.0 %	16.8 %
USD/AUD	1.43	0.5 %	4.2 %
USD/SGD	1.39	0.1 %	2.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	110	(6.8) %	42.3 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,843	(0.3) %	1.6 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,474	(1.1) %	(12.1) %
Copper(USD/MT)	9,101	(0.0) %	(5.8) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.2	(0.0) %	1.6 %

**Global Economy:** After reporting a sharp increase in U.S. industrial production in the previous month, the Federal Reserve released a report showing industrial production edged modestly higher in the month of May. industrial production crept up by 0.2 percent in May after surging by an upwardly revised 1.4 percent in April. The uptick in industrial production came as mining and utilities output shot up by 1.3 percent and 1.0 percent, respectively, offsetting a 0.1 percent dip in manufacturing output. The report also showed capacity utilization in the industrial sector inched up to 79.0 percent in May from a downwardly revised 78.9 percent in April. The Conference Board released a report showing a continued decrease by its reading on leading U.S. economic indicators in the month of May. The report showed the Conference Board's leading economic index fell by 0.4 percent in May, matching the revised drop seen in April. Meanwhile, the report showed the coincident economic index edged up by 0.2 percent in May following a 0.5 percent increase in April. Eurozone inflation accelerated to a fresh record high in May driven by surging energy prices, final data from Eurostat showed. Inflation rose to 8.1 percent in May, in line with flash estimate, from 7.4 percent in April. A year earlier, the rate was 2.0 percent. Core inflation that excludes energy, food, alcohol and tobacco, increased to 3.8 percent from 3.5 percent in the previous month. On a monthly basis, the harmonized index of consumer prices gained 0.8 percent in May.

**Global Indices:** The tech-heavy Nasdaq jumped 152.25 points or 1.4 percent to 10,798.35 and the S&P 500 crept up 8.07 points or 0.2 percent to 3,674.84, the narrower Dow edged down 38.29 points or 0.1 percent to 29,888.78, closing at its lowest level since December of 2020.

**Indian Economy:** The figures of Direct Tax collections for the Financial Year 2022-23, as on 16.06.2022 show that net collections are at Rs.3,39,225 crore compared to Rs. 2,33,651 crore over the corresponding period of the preceding year, representing an increase of 45% over the collections of the preceding year. The TDS collections for F.Y. 2022-23 (as on 16.06.2022) stand at Rs. 2,29,676 crore against TDS collections of Rs. 1,57,434 crore for the corresponding period of the immediately preceding Financial Year, showing a growth of nearly 46%.

**Equity Market:** The barometer index, the S&P BSE Sensex, declined 135.37 points or 0.26% to 51,360.42. The Nifty 50 index fell 67.10 points or 0.44% to 15,293.50.

**Corporate News:** Aurobindo Pharma has approved the acquisition of 51% equity shares in GLS Pharma Limited, operating in oncology business and having manufacturing facility in Hyderabad for a total consideration of Rs 28.05 crore. Moody's Investors Service has affirmed the Baa3 deposit ratings of ICICI Bank and Axis Bank. At the same time Moody's has upgraded both the banks' baseline credit assessments (BCA) to baa3 from ba1 reflecting improvements in credit fundamentals, in particular asset quality. The outlook on ratings for both banks remains stable.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(399.9)	(325.7)	(251.9)
MF(INR cr)	32.3	942.6	1,219.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	64,726	48,779	58,434
F&O(INR cr)	6,127,741	10,720,756	10,499,233

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.1	27.9	27.0
NSE VIX	22.8	21.0	20.9

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,743	0.4 %	(11.9) %	Energy	24,155	(0.9) %	(8.7) %
IT	26,732	(1.5) %	(26.4) %	Pharma	11,804	(2.2) %	(13.1) %
Metals	4,725	0.1 %	(27.1) %	Finance	15,059	0.4 %	(13.8) %
Auto	10,831	(1.1) %	1.4 %	PSU	2,368	(0.8) %	(16.5) %
FMCG	36,265	(1.0) %	(1.2) %	Real Estate	378	(0.0) %	(20.4) %

### 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>
One 97	630	2.6 %	10.3 %	Bajaj Hold	4,472	(6.4) %	(17.2) %
Bajaj Fina	5,420	2.6 %	(26.8) %	Titan Comp	1,936	(6.0) %	(23.2) %
Bajaj Fins	11,755	2.5 %	(31.4) %	Avenue Sup	3,461	(6.0) %	(15.2) %
Cholaman.I	641	2.4 %	(9.4) %	Pidilite I	1,999	(4.7) %	(19.6) %
S A I L	68	1.8 %	(33.0) %	Adani Tran	2,033	(4.3) %	(16.1) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
German PPI m/m	20-06-2022	11:30	EUR	-	0.028
ECB President Lagarde Speaks	20-06-2022	18:30	EUR	-	-
German Buba President Nagel Speaks	20-06-2022	22:30	EUR	-	-
Rightmove HPI m/m	20-06-2022	04:31	GBP	-	0.021
MPC Member Haskel Speaks	20-06-2022	13:30	GBP	-	-
BusinessNZ Services Index	20-06-2022	04:00	NZD	-	51.4
FOMC Member Bullard Speaks	20-06-2022	22:15	USD	-	-

..... End of Report .....