



21 May.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,067	0.0 %	9.8 %
BSE SENSEX	30,819	2.1 %	9.3 %
CNX BANK	17,840	0.0 %	(2.0) %
CNX MIDCAP	12,664	0.0 %	10.4 %
CNX SMALLCAP	3,852	0.0 %	8.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,576	1.5 %	(13.9) %
S&P 500	2,972	1.7 %	(8.0) %
FTSE 100	6,067	1.1 %	(20.2) %
HANG SENG	24,400	0.1 %	(14.5) %
NIKKEI	20,595	0.8 %	(11.2) %
SHANGHAI COMPOSITE	2,884	(0.5) %	(6.5) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.05	(0.1) %	5.4 %
EUR/USD	1.10	1.0 %	(2.3) %
GBP/USD	1.22	0.8 %	(7.1) %
USD/JPY	107.64	0.3 %	(0.9) %
USD/AUD	1.52	(1.5) %	6.7 %
USD/SGD	1.42	(0.5) %	5.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	34	6.7 %	(44.5) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,758	(0.4) %	14.0 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,454	(0.7) %	(17.9) %
Copper(USD/MT)	5,333	0.4 %	(13.5) %

**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) %	(1.3) %

**Global Economy:** In addition to the severely adverse near-term effects of the coronavirus pandemic, the minutes of the Federal Reserve's latest monetary policy meeting noted the outbreak and the measures undertaken to contain it have also created an extraordinary amount of uncertainty and considerable risks to economic activity in the medium term. The minutes said participants at the late-April meeting discussed several alternative scenarios with regard to the behaviour of economic activity in the medium term that all seemed about equally likely. A number of participants believed there was a substantial likelihood of additional waves of the coronavirus outbreak, which could lead to further economic disruptions. Eurozone consumer confidence rose slightly in May as several countries in the single-currency bloc started easing restrictions placed during the lockdown to slow the spread of the coronavirus, or Covid-19, flash estimates from the European Union showed on Wednesday. The flash consumer confidence index for euro area climbed to -18.8 from -22.7 in April. Economists had expected a further weakening to -24.

**Global Equities:** US stocks surged as signs that the government will offer further stimulus propped up the sentiments. Nasdaq hit a three month high.

**Indian Economy:** India's overseas direct investment in April fell 62% to USD 976.14 million, data from the Reserve Bank showed. The fall in ODI can mainly be attributed to the coronavirus pandemic, which led to a global lockdown and halt in most of the business activities. Domestic firms had invested nearly USD 2.56 billion in their joint ventures/wholly-owned subsidiaries during April 2019, according to the RBI data on Outward Foreign Direct Investment.

**Equity Markets:** Key domestic benchmarks rallied on Wednesday, supported by firmness in HDFC twins and Reliance Industries. The Nifty Bank index snapped its four-day losing streak and ended with strong gains. The barometer S&P BSE Sensex jumped 622.44 points or 2.06% at 30,818.61. The Nifty 50 index gained 187.45 points or 2.11% at 9,066.55.

**Corporate News:** Bajaj Auto's consolidated net profit declined 3.87% to Rs 1,353.99 crore on 10.22% fall in total income to Rs 7,392.38 crore in Q4 March 2020 over Q4 March 2019. Jubilant FoodWorks' consolidated net profit dropped 57.89% to Rs 33.13 crore on 4.65% rise in total income to Rs 929.51 crore in Q4 March 2020 over Q4 March 2019. JK Lakshmi Cement's consolidated net profit surged 142.54% to Rs 99.15 crore on 10.52% fall in total income to Rs 1,156.76 crore in Q4 March 2020 over Q4 March 2019. Supreme Petrochem's net profit dropped 39.64% to Rs 23.51 crore on 19.28% fall in total income to Rs 665.37 crore in Q4 March 2020 over Q4 March 2019.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(176.3)	98.8	37.7
MF(INR cr)	706.0	(59.3)	(289.2)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	48,390	54,244	51,409
F&O(INR cr)	1,220,838	1,175,901	1,160,326

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.0	32.0	37.5
NSE VIX	35.8	39.2	42.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	17,840	2.0 %	(2.0) %	Energy	12,509	2.1 %	16.1 %
IT	13,517	0.5 %	12.2 %	Pharma	9,457	4.1 %	34.6 %
Metals	1,712	1.1 %	10.2 %	Finance	8,984	3.1 %	0.5 %
Auto	5,604	2.1 %	20.3 %	PSU	1,092	0.5 %	(14.9) %
FMCG	27,290	1.5 %	3.5 %	Real Estate	166	2.2 %	(3.7) %

### 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>
Aurobindo	708	6.8 %	80.4 %	Bharti Inf	201	(8.2) %	29.5 %
Page Indus	18,652	6.6 %	12.3 %	Oracle Fin	2,339	(3.3) %	21.7 %
DLF	139	5.9 %	5.1 %	IndusInd B	357	(2.9) %	4.4 %
Shree Ceme	19,412	5.8 %	17.3 %	Hero Motoc	2,024	(2.4) %	23.4 %
M & M	405	5.8 %	48.5 %	Hind.Zinc	171	(2.0) %	6.4 %

### 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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