



21 May.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,906	(0.8) %	0.3 %
BSE SENSEX	49,565	(0.7) %	(0.9) %
CNX BANK	33,335	(1.0) %	(1.5) %
CNX MIDCAP	25,212	(0.1) %	4.5 %
CNX SMALLCAP	9,037	(0.2) %	9.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,084	0.6 %	11.4 %
S&P 500	4,159	1.1 %	10.7 %
FTSE 100	7,020	1.0 %	6.8 %
HANG SENG	28,450	(0.5) %	3.6 %
NIKKEI	28,098	0.2 %	3.1 %
SHANGHAI COMPOSITE	3,507	(0.1) %	0.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.09	(0.2) %	0.2 %
EUR/USD	1.22	0.5 %	(0.5) %
GBP/USD	1.42	0.5 %	3.9 %
USD/JPY	109.01	(0.2) %	5.7 %
USD/AUD	1.28	(0.4) %	(1.1) %
USD/SGD	1.33	(0.4) %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(3.3) %	33.1 %
Gold(INR/10g)	47,569	0.0 %	(6.7) %
Gold Comex(USD/oz)	1,873	0.0 %	(3.9) %
SILVER(INR/1Kg)	69,875	0.0 %	1.5 %
Aluminium(USD/MT)	2,403	(2.7) %	19.3 %
Copper(USD/MT)	10,115	(3.3) %	27.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.0 %	0.8 %

Global Economy: The Philly Fed's Manufacturing latest Manufacturing Index came in at 31.5 in May, down 18.7 from last month's 50.2. The 3-month moving average came in at 42.1, up from 38.7 last month. The number of US workers seeking and receiving unemployment benefits through state and federal programs has reached pandemic lows. Initial unemployment claims through regular state programs dropped to 444,000 last week, marking a new low level since the pandemic hit in mid-March 2020. Eurozone's construction output rose in March after falling in the previous month, data from Eurostat showed on Thursday. The construction output grew 2.7% month-on-month in March, after a 2% fall in February. Eurozone's current account surplus in March decreased from the previous month, data from the European Central Bank showed Thursday. The current account surplus dropped to EUR 18 billion from EUR 26 million in February. In the same month last year, the surplus was EUR 10 billion. The goods trade surplus decreased to EUR 24 billion from EUR 33 billion in the previous month. In the same month last year, there was a deficit of EUR 7 billion as the coronavirus pandemic severely hurt economic activity. UK manufacturing orders logged its strongest upturn since late 2017, survey results from the Confederation of British Industry showed on Thursday. According to the latest Industrial Trends survey results, the total order book balance rose to +17% in May from -8% in April. Japan merchandise trade surplus came in at 255.3 billion yen in April, the Ministry of Finance said on Thursday, following the downwardly revised 662.2 billion yen surplus in March (originally 663.7 billion yen). Exports surged 38% on year to 7.181 trillion yen, after climbing 16.1% in the previous month. Imports advanced an annual 12.8% to 6.925 trillion yen, up from 5.8% a month earlier.

Global Equities: The US stocks stayed largely supported after recent spate of volatility. Centers for Disease Control and Prevention said that almost half of the US population have received at least one vaccine dose against coronavirus.

Indian Economy: Point-to-point rate of inflation based on the CPI-AL (Consumer Price Index for Agricultural Labourers) and CPI-RL (Consumer Price Index for Rural Labourers) decreased to 2.66% and 2.94% in April 2021, from 2.78% and 2.96%, respectively, in March, 2021. India's daily Covid-19 recoveries continue to outnumber the daily new cases for the seventh consecutive day. A total of 3,69,077 recoveries were registered on Wednesday. India's cumulative recoveries have reached 2,23,55,440. The National Recovery Rate has grown further to touch 86.74%. Ten states account for 75.11% of the new recoveries. Meanwhile, India recorded less than 3 lakh new cases for four consecutive days now.

Equity Markets: The domestic equity benchmarks ended near the day's low after a volatile trade on Thursday. Bourses witnessed bouts of volatility on account on weekly index options expiry on the NSE. The Nifty ended a tad above the 14,900 mark. Fertilizer shares were in demand after the government hiked DAP fertilizer subsidy by 140%.

Corporate News: HPCL reported sharply higher standalone profit at Rs 3,018 crore for Q4FY21 against Rs 2,345.6 crore in Q3FY21. Its revenue rose to Rs 85,203.55 crore from Rs 77,412.68 crore in the previous quarter. Zee Entertainment Enterprises reported consolidated profit at Rs 275.8 crore for Q4FY21 against loss of Rs 766.7 crore in Q4FY20. The revenue rose to Rs 1,965.8 crore from Rs 1,951.1 crore YoY. Sugar stocks will be watched as India has cut sugar export subsidies by 31.4% for the current season which ends on September 30th. State Bank of India, Hindalco Industries, JSW Steel, Container Corporation of India will be in focus ahead of latest quarterly earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	347.1	(38.6)	(67.3)
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)	78,149	77,597	73,806
F&O(INR cr)	8,172,083	4,466,855	4,584,518

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.3	20.3	18.5
NSE VIX	19.7	20.8	21.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,335	(1.0) %	(1.5) %	Energy	19,156	(0.8) %	3.5 %
IT	25,894	(0.3) %	(0.3) %	Pharma	13,970	(0.2) %	12.9 %
Metals	5,077	(3.2) %	21.2 %	Finance	15,832	(0.9) %	(0.5) %
Auto	10,226	(0.2) %	2.0 %	PSU	2,262	0.4 %	2.1 %
FMCG	34,476	(0.7) %	(1.1) %	Real Estate	317	1.0 %	(5.6) %

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>
Bosch	15,846	7.2 %	11.8 %	Tata Steel	1,105	(5.1) %	28.0 %
Adani Tran	1,386	4.7 %	38.7 %	Hindalco I	385	(4.5) %	10.0 %
Punjab Nat	38	3.6 %	(1.8) %	GAIL (Indi	147	(3.6) %	5.1 %
M & M	803	2.4 %	(0.5) %	Coal India	147	(3.4) %	11.0 %
SBI Cards	1,035	2.3 %	6.3 %	Britannia	3,423	(3.2) %	(5.4) %

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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