



21 Jun.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,683	(0.1) %	5.5 %
BSE SENSEX	52,344	0.0 %	4.6 %
CNX BANK	34,558	(0.1) %	2.1 %
CNX MIDCAP	26,496	(1.0) %	9.9 %
CNX SMALLCAP	9,574	(0.9) %	15.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,290	(1.6) %	8.8 %
S&P 500	4,166	(1.3) %	10.9 %
FTSE 100	7,017	(1.9) %	6.8 %
HANG SENG	28,801	0.9 %	4.8 %
NIKKEI	28,964	(0.2) %	6.3 %
SHANGHAI COMPOSITE	3,525	(0.0) %	0.6 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.94	0.8 %	1.4 %
EUR/USD	1.19	(1.2) %	(2.6) %
GBP/USD	1.40	(0.9) %	2.2 %
USD/JPY	110.51	0.3 %	7.1 %
USD/AUD	1.32	1.2 %	1.6 %
USD/SGD	1.34	0.8 %	1.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	0.8 %	50.4 %
Gold(INR/10g)	47,122	(0.6) %	(7.6) %
Gold Comex(USD/oz)	1,764	(1.1) %	(9.5) %
SILVER(INR/1Kg)	68,675	(1.2) %	(0.3) %
Aluminium(USD/MT)	2,374	(2.2) %	17.9 %
Copper(USD/MT)	9,206	(2.3) %	16.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.4	(0.1) %	0.5 %

**Global Economy:** The euro area current account surplus rose in April, the European Central Bank reported Friday. The current account surplus totaled EUR 23 billion in April versus EUR 18 billion surplus in the previous month. The visible trade surplus widened to EUR 27 billion from EUR 24 billion, while the surplus on services trade held steady at EUR 8 billion. Primary income showed a surplus of EUR 1 billion compared to a EUR 2 billion shortfall in March. Germany's producer prices increased to the highest level in twelve-and-a-half years in May, Destatis reported Friday. Producer prices increased 7.2% year-on-year in May, faster than the 0.8% gain seen in April. UK retail sales dropped in May after a sharp growth in April, data from the Office for National Statistics revealed on Friday. Retail sales fell 1.4% month-on-month in May, reversing a 9.2% gain in April. Excluding auto fuel, retail sales dropped 2.1% in May. On a yearly basis, the retail sales volume growth moderated to 24.6% in May from 42.4% a month ago. The Bank of Japan (BOJ) decided to hold the interest rate at -0.1% on current accounts that financial institutions maintain at the central bank. The bank will continue to purchase a necessary amount of Japanese government bonds without setting an upper limit so that 10-year JGB yields will remain at around zero percent. The Bank decided by majority vote to extend the duration of the Special Program to Support Financing in Response to the Novel Coronavirus by six months until the end of March 2022 with a view to continuing to support financing, mainly of firms.

**Global Equities:** The US stocks added to recent losses on Friday. With the drop on the day, the Dow ended the session at its lowest closing level in over two months.

**Indian Economy:** The government is open to coming out with more measures to boost the economy which has been hit by the second wave of the coronavirus pandemic, stated Chief Economic Advisor (CEA) K V Subramanian. Industry chamber CII President T V Narendran has suggested that the government should follow a cautious approach in opening up of all activities with a view to avoid a possible third wave of the COVID pandemic.

**Equity Markets:** After trading in red for majority part of the sessions, the domestic equity benchmarks ended sideways on Friday. The Nifty closed above the 15,700 mark. Metal stocks declined after China announced plans to release its state reserves of copper, aluminum and zinc to ensure stable prices of commodities.

**Corporate News:** ICICI Bank will be in focus. Global rating agency S&P has reaffirmed ICICI Bank's rating at BBB- and has changed the outlook from negative to stable. The stable outlook reflects S&P's expectation that bank's capitalisation will remain strong over the next 24 months, despite some deterioration in asset quality owing to COVID-19. NTPC reported sharply higher consolidated profit at Rs 4,649.49 crore in Q4FY21 against Rs 1,629.86 crore in Q4FY20. Revenue fell to Rs 30,102.6 crore from Rs 30,390.51 crore YoY. SAIL has postponed its plans to begin commercial production of head hardened (HH) rails at its Bhilai Steel Plant in Chhattisgarh, as the foreign experts involved in the trials left India in the wake of the second Covid wave.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(123.9)	107.1	13.3
MF(INR cr)	(20.2)	(85.2)	110.8

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	105,975	81,657	76,114
F&O(INR cr)	3,922,007	4,708,181	4,550,997

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.8	17.2	18.2
NSE VIX	14.8	15.4	19.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,558	(0.1) %	2.1 %	Energy	20,164	(1.9) %	8.9 %
IT	28,446	(0.6) %	9.5 %	Pharma	14,031	(0.4) %	13.4 %
Metals	5,049	(0.9) %	20.5 %	Finance	16,419	0.1 %	3.2 %
Auto	10,444	(0.8) %	4.2 %	PSU	2,379	(1.8) %	7.4 %
FMCG	36,287	0.3 %	4.1 %	Real Estate	344	(0.8) %	2.4 %

### 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>
Adani Ente	1,488	8.8 %	34.3 %	Adani Tran	1,240	(5.0) %	24.1 %
Adani Port	694	7.3 %	(5.7) %	Adani Gree	1,068	(5.0) %	(8.0) %
Piramal En	2,237	3.4 %	25.7 %	SBI Cards	1,006	(4.4) %	3.2 %
Bajaj Auto	4,167	2.8 %	11.3 %	H P C L	296	(4.3) %	24.5 %
Hind. Unil	2,483	2.7 %	3.5 %	O N G C	120	(3.9) %	15.2 %

### 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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