



21 Jun.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,350	0.0 %	(13.1) %
BSE SENSEX	51,598	0.5 %	(12.6) %
CNX BANK	32,685	0.0 %	(12.0) %
CNX MIDCAP	25,293	0.0 %	(16.1) %
CNX SMALLCAP	7,983	0.0 %	(24.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,889	(0.1) %	(17.7) %
S&P 500	3,675	0.2 %	(22.9) %
FTSE 100	7,122	1.5 %	(5.1) %
HANG SENG	21,164	0.4 %	(9.1) %
NIKKEI	25,771	(0.7) %	(12.0) %
SHANGHAI COMPOSITE	3,315	(0.0) %	(8.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	77.76	(0.1) %	4.6 %
EUR/USD	1.05	0.2 %	(7.7) %
GBP/USD	1.22	(0.2) %	(9.7) %
USD/JPY	135.08	1.5 %	17.3 %
USD/AUD	1.44	1.1 %	4.8 %
USD/SGD	1.39	0.3 %	3.1 %

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	0.0 %	1.6 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,462	(0.5) %	(12.6) %
Copper(USD/MT)	8,875	(2.5) %	(8.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.3	0.1 %	1.7 %

Global Economy: Eurozone construction output declined for the first time in four months in April, due to a sharp contraction in the civil engineering sector, according to the data from Eurostat. Construction output dropped 1.1 percent in April, reversing a 0.1 percent increase in March, which was revised from a nil growth seen in the previous estimate. On a yearly basis, growth in construction output slowed to 3.0 percent in April from 3.4 percent in March. Germany producer price inflation rose to a fresh record high in May driven by energy prices, data from Destatis showed. Producer prices logged a double-digit growth of 33.6 percent year-on-year in May, following April's 33.5 percent increase. On a monthly basis, producer prices gained 1.6 percent after rising 2.8 percent in April. Energy prices as a whole surged 87.1 percent from the previous year. Excluding energy, producer prices advanced 16.5 percent. The UK property prices rose to a new record for the fifth consecutive month in June but a slowdown in price growth is expected for the coming months, property website Rightmove reported. Property prices rose only 0.3 percent on month, the slowest increase since January, as the pace of price growth started to slow. New Zealand's service sector expanded at the fastest pace in eleven months in May, as activity and new orders rose at sharper rates, survey figures from Business NZ showed. The performance of services index, or PSI, rose to 55.2 in May from 52.2 in April. A reading above 50 indicates an expansion in the sector.

Global Indices: Germany's DAX jumped 139.34 points or 1.06 percent to finish at 13,265.60, London's FTSE spiked 105.56 points or 1.50 percent to close at 7,121.81 and the CAC 40 in France gained 37.44 points or 0.64 percent to end at 5,920.09.

Indian Economy: FICCI's latest quarterly survey on Manufacturing sector reveals that momentum of growth continued in subsequent quarters of Q-4 (Jan-Mar 2021-22) and Q-1 April-June (2022-23) and there seems to be an improvement in hiring employment outlook after a long gap. The survey noted that 54.8% respondents reported higher production levels in Q-1 (April- June 2022-23), with an average expectation of increase in production by over 10%. The survey reports improvement in employment creation by the sector as 53% of the respondents are now looking at hiring additional workforce in the next three months. The outlook for exports seems to be positive as 53.4% of the respondents expect an average increase of 15.2% in exports in Q-1 2022-23 as compared to the first quarter of last year.

Equity Market: The barometer index, the S&P BSE Sensex, rose 237.42 points or 0.46% to 51,597.84. The Nifty 50 index rose 56.65 points or 0.37% to 15,350.15. The headline indices corrected over 7% in the past six trading sessions.

Corporate News: Adani Power completed the acquisition of 100% equity shares in Support Properties Private Limited (SPPL) and Eternus Real Estate Private Limited (EREPL) from their respective shareholders. Bharat Forge has approved the transfer of its stake in Refu Drive GmbH (Refu), joint venture (JV) company to Kalyani Powertrain in order to house all the electric vehicle investments of the company under one entity.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(1,146.5)	(388.8)	(269.4)
MF(INR cr)	524.1	1,009.8	1,228.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	48,248	48,741	58,246
F&O(INR cr)	6,760,749	10,437,899	10,430,002

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.1	27.9	27.0
NSE VIX	22.4	21.1	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	32,685	(0.2) %	(12.0) %	Energy	23,701	(1.9) %	(10.4) %
IT	26,966	0.9 %	(25.8) %	Pharma	11,848	0.4 %	(12.8) %
Metals	4,541	(3.9) %	(29.9) %	Finance	15,204	1.0 %	(13.0) %
Auto	10,755	(0.7) %	0.7 %	PSU	2,309	(2.5) %	(18.5) %
FMCG	36,916	1.8 %	0.6 %	Real Estate	371	(1.8) %	(21.9) %

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>
Pidilite I	2,107	5.4 %	(15.3) %	Vedanta	230	(12.7) %	(43.2) %
Godrej Con	759	4.6 %	0.8 %	Bandhan Ba	274	(11.7) %	(14.4) %
Hind. Unil	2,196	4.0 %	5.7 %	GAIL (Indi	131	(5.6) %	(19.1) %
H D F C	2,135	4.0 %	(12.9) %	S A I L	65	(5.2) %	(36.5) %
Dabur Indi	501	3.3 %	(7.7) %	Interglobe	1,549	(5.1) %	(22.5) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA Gov Lowe Speaks	21-06-2022	05:30	AUD	-	-
Monetary Policy Meeting Minutes	21-06-2022	07:00	AUD	-	-
Core Retail Sales m/m	21-06-2022	18:00	CAD	-	0.024
Trade Balance	21-06-2022	11:30	CHF	-	-
Current Account	21-06-2022	13:30	EUR	-	-
MPC Member Pill Speaks	21-06-2022	13:00	GBP	-	-
CBI Industrial Order Expectations	21-06-2022	15:30	GBP	-	26
MPC Member Tenreyro Speaks	21-06-2022	17:45	GBP	-	-
Westpac Consumer Sentiment	21-06-2022	02:30	NZD	-	92.1
Existing Home Sales	21-06-2022	19:30	USD	-	-
FOMC Member Mester Speaks	21-06-2022	21:30	USD	-	-

..... End of Report