



22 May.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,106	0.0 %	10.3 %
BSE SENSEX	30,933	0.4 %	9.3 %
CNX BANK	17,735	0.0 %	(2.6) %
CNX MIDCAP	12,763	0.0 %	11.3 %
CNX SMALLCAP	3,875	0.0 %	9.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,474	(0.4) %	(14.2) %
S&P 500	2,949	(0.8) %	(8.7) %
FTSE 100	6,015	(0.9) %	(20.9) %
HANG SENG	24,280	(0.5) %	(14.9) %
NIKKEI	20,552	(0.2) %	(11.4) %
SHANGHAI COMPOSITE	2,868	(0.6) %	(7.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.99	(0.1) %	5.3 %
EUR/USD	1.10	0.3 %	(2.2) %
GBP/USD	1.22	(0.2) %	(7.3) %
USD/JPY	107.69	0.0 %	(0.9) %
USD/AUD	1.52	(0.4) %	6.8 %
USD/SGD	1.42	(0.1) %	5.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	34	(0.1) %	(44.6) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,741	(1.0) %	12.9 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,487	2.3 %	(16.1) %
Copper(USD/MT)	5,387	1.0 %	(12.6) %

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: The US Conference Board released a report on Thursday showing a continued nosedive by its reading on leading economic indicators. The Conference Board said its leading economic index tumbled by 4.4% in April after plunging by a revised 7.4% in March. The US existing home sales plunged by 17.8% to an annual rate of 4.33 million in April after tumbling by 8.5% to 5.27 million in March. First-time claims for US unemployment benefits pulled back further off the record high set in late March in the week ended May 16th, according to a report released by the Labor Department. The report said initial jobless claims dropped to 2.438 million, a decrease of 249,000 from the previous week's revised level of 2.687 million. The Euro area private sector remained in its deepest downturn ever in May due to the containment measures taken amid coronavirus, or Covid-19, pandemic, flash survey results from IHS Markit showed Thursday. The composite output index jumped to 30.5 in May from a record low 13.6 in April. A score below 50 indicates contraction. The prior low of 36.2 was seen during the peak of the global financial crisis in February 2009. The flash services Purchasing Managers' Index rose to 28.7 from 12.0 in the previous month. This was the highest score since February this year. The flash factory PMI moved up to 39.5 from 33.4 in April.

Global Equities: Weak economic data and mounting US-China trade concerns weighed on global stocks.

Indian Economy: According to RBI data, the bank credit growth stood at 6.52% year-on-year to Rs 102.52 trillion, while deposits grew 10.64% to Rs 138.50 lakh crore in the fortnight ended May 8th. In the fortnight ended May 10, 2019, bank loans had stood at Rs 96.24 lakh crore, and deposits at Rs 125.17 lakh crore. The Office of Finance Minister Nirmala Sitharaman said that GoI has released a total amount of Rs 92,077 crore, as state's share in the devolution of central taxes and duties for the months of April and May 2020. The devolution amount for April stood at Rs 46,038.10 crore, while for May, it is Rs 46,038.70 crore.

Equity Markets: Local market ended with decent gains on Thursday, extending its winning run for the third straight session. As per provisional closing, the barometer S&P BSE Sensex was up 114.29 points or 0.37% at 30,932.90. The Nifty 50 index rose 31.45 points or 0.35% at 9,098. Banks shares reversed trend after opening higher.

Corporate News: Metal counters could ease as COMEX Copper fell more than a percent yesterday, coming off their two and half month high. Nahar Spinning said that the company's manufacturing facilities in Punjab and Madhya Pradesh have partially resumed operations. Automotive Axles said that the company's offices and manufacturing have resumed at Jamshedpur and Hosur. Rising crude oil prices could weigh on local oil marketing companies. WTI Crude hit a two month high above 34.60 per barrel.



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)	48,526	53,836	51,319
F&O(INR cr)	2,343,597	1,259,308	1,197,303

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.5	31.9	37.3
NSE VIX	33.0	38.7	42.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	17,735	(0.6) %	(2.6) %	Energy	12,503	(0.0) %	16.1 %
IT	13,648	1.0 %	13.3 %	Pharma	9,521	0.7 %	35.5 %
Metals	1,743	1.8 %	12.2 %	Finance	8,924	(0.7) %	(0.2) %
Auto	5,750	2.6 %	23.5 %	PSU	1,100	0.7 %	(14.3) %
FMCG	27,887	2.2 %	5.8 %	Real Estate	166	(0.2) %	(3.8) %

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>
ITC	189	7.5 %	13.6 %	Bandhan Ba	211	(5.1) %	8.2 %
Interglobe	979	7.3 %	(2.0) %	Bajaj Fins	4,539	(3.5) %	0.8 %
Hindalco I	130	7.2 %	41.3 %	Adani Tran	179	(3.0) %	(5.6) %
Ashok Leyl	46	6.3 %	12.2 %	IndusInd B	347	(2.9) %	1.3 %
United Spi	610	6.1 %	31.8 %	NTPC	90	(2.9) %	11.4 %

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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