



22 Jun.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,244	1.5 %	24.1 %
BSE SENSEX	34,732	1.5 %	22.9 %
CNX BANK	21,338	1.8 %	17.2 %
CNX MIDCAP	14,566	1.0 %	27.0 %
CNX SMALLCAP	4,577	1.9 %	29.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,871	(0.8) %	(9.3) %
S&P 500	3,098	(0.6) %	(4.1) %
FTSE 100	6,293	1.1 %	(17.2) %
HANG SENG	24,644	0.7 %	(13.7) %
NIKKEI	22,479	0.6 %	(3.1) %
SHANGHAI COMPOSITE	2,968	1.0 %	(3.8) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.95	(0.0) %	6.7 %
EUR/USD	1.12	(0.2) %	(0.1) %
GBP/USD	1.24	(0.7) %	(6.0) %
USD/JPY	106.90	0.0 %	(1.6) %
USD/AUD	1.46	0.1 %	2.3 %
USD/SGD	1.40	0.1 %	3.7 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	2.3 %	(35.0) %
Gold(INR/10g)	47,519	0.5 %	21.9 %
Gold Comex(USD/oz)	1,761	1.5 %	14.2 %
SILVER(INR/1Kg)	48,069	(0.2) %	4.4 %
Aluminium(USD/MT)	1,578	(0.5) %	(10.9) %
Copper(USD/MT)	5,836	0.6 %	(5.4) %

## 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) %	(1.2) %

**Global Economy:** The US economic recovery from the novel coronavirus epidemic is set to be challenging and there will be no quick fix, Federal Reserve chairman Jerome Powell said on Friday. Euro area current account surplus fell to EUR 14.4 billion in April from EUR 27.4 billion in March, the European Central Bank showed Friday. This was the lowest since April 2017, when the surplus was EUR 11.7 billion. The surplus on trade in goods narrowed to EUR 13 billion from EUR 32 billion a month ago. Meanwhile, the surplus on services doubled to EUR 4 billion from EUR 2 billion. UK budget deficit reached a record high in May and government debt exceeded 100 percent of GDP for the first time since 1963 due to public health measures and economic stimulus adopted by the government amid coronavirus pandemic, official data showed. UK retail sales rebounded in May on non-food store sales. Retail sales volume increased at a pace of 12% on month, in contrast to an 18% decrease in April, the Office for National Statistics reported. Russia's central bank lowered its key rate by 100 basis points, as widely expected, citing weak economic activity and more profound disinflationary pressures due to the coronavirus containment measures. The bank reduced the benchmark rate to a record low 4.50% from 5.50%.

**Global Equities:** US stocks slipped on Friday, giving up their early gains. The Coronavirus infections continued to surge many states in the US and the World Health Organization warned that the pandemic is accelerating and the world is in a new and dangerous phase.

**Indian Economy:** Industry body CII has identified measures in key areas for improving India's ease of doing business scenario that can help the country achieve self-reliance. Micro, small and medium enterprises (MSMEs) need a special helping hand, and should be exempted from approvals and inspections for three years under state laws while following all rules, the Confederation of Indian Industry (CII) said in a report. Local diesel price on Sunday hit a fresh record high after rates were hiked by 60 paise per litre while petrol price was up 35 paise, taking the cumulative increase in rates in 15 days to Rs 8.88 a litre and Rs 7.97 respectively.

**Equity Markets:** The local market ended with strong gains on Friday, supported by positive global shares. Index heavyweight Reliance Industries (RIL) rallied over 6% on turning net-debt free after raising Rs 1.69 lakh crore in less than two months. The barometer S&P BSE Sensex rose 523.68 points or 1.53% at 34,731.73. The Nifty 50 index added 152.75 points or 1.51% at 10,244.40.

**Corporate News:** Pharma major Cipla Ltd announced the launch of its generic version of remdesivir, which has been authorised for emergency use in treatment of COVID-19 patients by the USFDA, under its brand name Cipremi. Glenmark Pharmaceuticals will also be in focus as Indian regulator approved its Favipiravir for the treatment of mild to moderate COVID-19 in India. Aegis Logistics, AIA Engineering, Balaji Amines, Dhanlaxmi Bank, Kirloskar Industries will be in focus ahead of latest earnings. Local metal and mining companies will be focus as COMEX Copper soared to six week high.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	73.1	182.8	85.0
MF(INR cr)	527.4	(231.5)	(86.1)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	87,064	65,286	56,409
F&O(INR cr)	1,106,172	1,650,188	1,351,310

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	35.1	30.8	34.7
NSE VIX	30.0	30.6	37.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,338	1.8 %	17.2 %	Energy	14,535	3.6 %	34.9 %
IT	14,500	(0.4) %	20.4 %	Pharma	10,002	0.3 %	42.3 %
Metals	1,998	(0.1) %	28.6 %	Finance	10,535	1.6 %	17.8 %
Auto	6,635	1.5 %	42.4 %	PSU	1,418	2.2 %	10.5 %
FMCG	28,709	0.2 %	8.9 %	Real Estate	213	6.4 %	23.7 %

### 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>
Indiabulls	203	31.1 %	104.7 %	Vodafone I	9	(6.2) %	200.0 %
Piramal En	1,163	11.8 %	24.2 %	Oracle Fin	2,592	(5.3) %	34.9 %
DLF	162	9.5 %	22.1 %	New India	124	(3.5) %	17.7 %
Bajaj Fins	5,900	8.7 %	31.1 %	Biocon	381	(3.2) %	36.9 %
Tata Motor	43	7.3 %	42.6 %	IndusInd B	484	(3.1) %	41.3 %

### 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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