



22 Jun.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,747	0.4 %	5.9 %
BSE SENSEX	52,574	0.4 %	5.1 %
CNX BANK	34,871	0.9 %	3.0 %
CNX MIDCAP	26,705	0.8 %	10.7 %
CNX SMALLCAP	9,636	0.7 %	16.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,877	1.8 %	10.7 %
S&P 500	4,225	1.4 %	12.5 %
FTSE 100	7,062	0.6 %	7.5 %
HANG SENG	28,489	(1.1) %	3.7 %
NIKKEI	28,011	(3.3) %	2.8 %
SHANGHAI COMPOSITE	3,529	0.1 %	0.7 %

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)	47,005	(0.2) %	(7.9) %
Gold Comex(USD/oz)	1,764	(1.1) %	(9.5) %
SILVER(INR/1Kg)	67,877	(1.2) %	(1.4) %
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: Global foreign direct investment flows are set to pick up this year after a severe slump in 2020 as economic activity across the world was impacted by the coronavirus pandemic, a UN report showed Monday. FDI flows are likely to bottom out this year and recover some lost ground with an increase of 10-15%, the UNCTAD's latest World Investment Report said. The relatively modest recovery in global FDI projected for 2021 reflects lingering uncertainty about access to vaccines, the emergence of virus mutations and the reopening of economic sectors, the report said. China kept its benchmark lending rates unchanged on Monday. The one-year loan prime rate was maintained at 3.85 percent and the five-year loan prime rate was retained at 4.65 percent. The one-year and five-year loan prime rates were last lowered in April 2020. The one-year loan prime rate was cut by 20 basis points and five-year rate by 10 basis points in April 2020. UK house prices hit a new record high for the third consecutive month in June, property website Rightmove said on Monday. House prices increased by a moderate 0.8% month-on-month in June, which was slower than the 1.8% gain in May. Although this was the largest increase at this time of year since 2015, buoyed by the strength of both the top end of the market and hotspot lifestyle change locations, data indicates an early sign of slowing in the pace of the current hectic market, Rightmove said. Australia total value of retail sales was up a seasonally adjusted 0.1% on month in May, coming in at A\$31.069 billion, the Australian Bureau of Statistics said on Monday, following the 1.1% increase in April. On a yearly basis, retail trade was up 7.4% after surging 25% in April.

Global Equities: The US stocks rebounded after heavy losses in last week. DOW saw excellent buying as two month lows triggered good bargain hunting.

Indian Economy: The second wave of the COVID-19 pandemic that hit India during April-May 2021 was extremely intense and impacted the functioning of businesses, which had just started moving on the path towards normalcy after the end of the first wave. The swift pace at which the virus travelled across the nation led to a sudden jump in the overall infections with daily new case load touching new highs and putting enormous pressure on the country's healthcare system. A nationwide survey of businesses conducted by FICCI and Dhruva Advisors shows that 58% of the companies saw a 'high impact' on their businesses due to the state level lockdowns. Another 38% reported 'moderate impact' on their operations due to the state level lockdowns.

Equity Markets: Indices snapped three day losing streak and settled with modest gains on Monday. The Nifty managed to close near the 15,750 level amid value buying. Barring the IT and Auto index, all the sectoral indices on the NSE ended in the green.

Corporate News: Bharti Airtel and Tata Group have announced a strategic partnership for implementing 5G network solutions for India, which will be available for commercial development from January 2022. Metal counters will be in focus following the impressive spurt in Copper futures in global markets.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	355.0	124.8	20.1
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)	67,067	80,684	75,943
F&O(INR cr)	3,740,221	4,643,650	4,535,982

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.8	17.2	18.2
NSE VIX	15.1	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	34,871	0.9 %	3.0 %	Energy	20,440	1.4 %	10.4 %
IT	28,367	(0.3) %	9.2 %	Pharma	14,083	0.4 %	13.8 %
Metals	5,105	1.1 %	21.9 %	Finance	16,535	0.7 %	3.9 %
Auto	10,401	(0.4) %	3.8 %	PSU	2,477	4.1 %	11.9 %
FMCG	36,378	0.2 %	4.3 %	Real Estate	352	2.3 %	4.8 %

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>
Bandhan Ba	341	7.7 %	(2.8) %	UPL	772	(4.4) %	18.1 %
Adani Port	731	5.3 %	(0.7) %	Wipro	542	(1.4) %	30.2 %
Adani Tran	1,302	5.0 %	30.3 %	Havells In	983	(1.4) %	(7.1) %
Adani Gree	1,121	5.0 %	(3.4) %	Colgate-Pa	1,667	(1.4) %	6.7 %
NTPC	118	3.9 %	9.4 %	Jubilant F	3,248	(1.3) %	10.1 %

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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