



22 Jun.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,639	1.9 %	(11.5) %
BSE SENSEX	52,532	1.8 %	(11.4) %
CNX BANK	33,192	1.6 %	(10.7) %
CNX MIDCAP	26,194	3.6 %	(13.1) %
CNX SMALLCAP	8,256	3.4 %	(22.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,530	2.2 %	(16.0) %
S&P 500	3,765	2.5 %	(21.0) %
FTSE 100	7,152	0.4 %	(4.7) %
HANG SENG	21,560	1.9 %	(7.4) %
NIKKEI	26,246	1.8 %	(10.4) %
SHANGHAI COMPOSITE	3,307	(0.3) %	(9.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	77.76	(0.1) %	4.6 %
EUR/USD	1.05	(0.1) %	(7.7) %
GBP/USD	1.22	(0.4) %	(9.7) %
USD/JPY	135.08	0.4 %	17.3 %
USD/AUD	1.44	0.6 %	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: The National Association of Realtors released a report showing another steep drop in U.S. existing home sales in the month of May. NAR said existing home sales plunged by 3.4 percent to an annual rate of 5.41 million in May after slumping by 2.6 percent to a revised rate of 5.60 million in April. Existing home sales fell for the fourth consecutive month. Meanwhile, totaling housing inventory surged by 12.6 percent to 1.16 million units at the end of May from 1.03 million units at the end of April. Housing inventory is still down by 4.1 percent compared to a year ago. New Zealand posted a merchandise trade surplus of NZ\$263 million in May, according to Statistics New Zealand. Exports were worth NZ\$6.95 billion last month, accelerating from the downwardly revised NZ\$6.16 billion in the previous month (originally NZ\$631 million). Imports came in at NZ\$6.69 billion, up from the downwardly revised NZ\$5.72 billion in April (originally NZ\$5.73 billion). The euro area current account deficit increased notably in April, largely due to the shortfalls in primary and secondary income, the European Central Bank reported. The current account deficit widened to a seasonally adjusted EUR 6 billion from EUR 2 billion in March. In the twelve months to April, the current account recorded a surplus of EUR 182 billion or 1.5 percent of euro area GDP, compared with a surplus of EUR 316 billion or 2.7 percent of GDP in the same period last year.

Global Indices: The Dow jumped 641.47 points or 2.2 percent to 30,530.25, the Nasdaq surged 270.95 points or 2.5 percent to 11,069.30 and the S&P 500 spiked 89.95 points or 2.5 percent to 3,764.79.

Indian Economy: Indian private equity (PE) investments reached US\$ 70 billion in 2021, with over 2,000 deals, up 87% from the volumes recorded in 2020. According to Bain & Company's annual India Private Equity Report 2022, Consumer Tech and IT/ITES sectors together accounted for about 60% of the year's deal value at nearly US\$ 44 billion. The number of large cheque size investments increased significantly in 2022 with 11 deals for more than US\$ 1 billion, including Flipkart, Hexaware, and Mphasis, compared to six in 2020.

Equity Market: The barometer index, the S&P BSE Sensex, up 934.23 points or 1.81% to 52,532.07. The Nifty 50 index gained 288.65 points or 1.88% to 15,638.80.

Corporate News: Hero MotoCorp has further strengthened its commitment and operations in Turkiye with the introduction of Euro-5 compliant variants of its three globally popular products. The range of Hero MotoCorp products in the Turkiye include the Xpulse 200 4V motorcycle and Dash 110, Dash 125 scooters. Som Distilleries & Breweries' mainline Beer Brand "Hunter" had a market share of 55% in the premium beer segment in May 2022 in Madhya Pradesh. The market share is the highest amongst all the premium beer manufacturers in the state.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	43.8	(357.9)	(263.4)
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)	46,392	48,584	58,030
F&O(INR cr)	9,475,406	10,373,732	10,412,645

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.1	27.9	27.0
NSE VIX	21.1	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	33,192	1.6 %	(10.7) %	Energy	24,356	2.8 %	(7.9) %
IT	27,811	3.1 %	(23.5) %	Pharma	12,098	2.1 %	(10.9) %
Metals	4,721	4.0 %	(27.1) %	Finance	15,436	1.5 %	(11.6) %
Auto	10,974	2.0 %	2.8 %	PSU	2,403	4.1 %	(15.2) %
FMCG	37,318	1.1 %	1.6 %	Real Estate	384	3.7 %	(19.0) %

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 Tran	2,215	7.5 %	(8.5) %	One 97	639	(0.9) %	11.8 %
SBI Cards	721	6.8 %	(17.3) %	Indus Towe	208	(0.6) %	(5.9) %
S A I L	69	6.0 %	(32.6) %	Pidilite I	2,101	(0.3) %	(15.5) %
Titan Comp	2,078	5.9 %	(17.6) %	Apollo Hos	3,808	(0.1) %	(15.5) %
DLF	315	5.6 %	(18.4) %				

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
MI Leading Index m/m	22-06-2022	06:00	AUD	-	(0.002)
CB Leading Index m/m	22-06-2022	20:00	AUD	-	0.006
CPI m/m	22-06-2022	18:00	CAD	-	0.006
Gov Council Member Rogers Speaks	22-06-2022	20:10	CAD	-	-
SNB Chairman Jordan Speaks	22-06-2022	18:30	CHF	-	-
Consumer Confidence	22-06-2022	19:30	EUR	-	(21)
CPI y/y	22-06-2022	11:30	GBP	-	0.09
HPI y/y	22-06-2022	14:00	GBP	-	0.098
MPC Member Cunliffe Speaks	22-06-2022	14:10	GBP	-	-
Monetary Policy Meeting Minutes	22-06-2022	05:20	JPY	-	-
Trade Balance	22-06-2022	04:15	NZD	-	-
Credit Card Spending y/y	22-06-2022	08:30	NZD	-	0.011
Fed Chair Powell Testifies	22-06-2022	19:00	USD	-	-

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