



23 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,311	0.0 %	24.9 %
BSE SENSEX	34,911	0.5 %	23.6 %
CNX BANK	21,708	0.0 %	19.2 %
CNX MIDCAP	14,797	0.0 %	29.0 %
CNX SMALLCAP	4,683	0.0 %	32.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,025	0.6 %	(8.8) %
S&P 500	3,118	0.7 %	(3.5) %
FTSE 100	6,245	(0.8) %	(17.9) %
HANG SENG	24,511	(0.5) %	(14.1) %
NIKKEI	22,437	(0.2) %	(3.3) %
SHANGHAI COMPOSITE	2,965	(0.1) %	(3.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.68	(0.4) %	6.3 %
EUR/USD	1.12	(0.0) %	0.1 %
GBP/USD	1.24	(0.5) %	(5.8) %
USD/JPY	106.91	0.0 %	(1.6) %
USD/AUD	1.45	(0.3) %	1.9 %
USD/SGD	1.39	0.1 %	3.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	2.5 %	(33.4) %
Gold(INR/10g)	47,928	0.9 %	22.9 %
Gold Comex(USD/oz)	1,775	0.8 %	15.1 %
SILVER(INR/1Kg)	48,702	1.3 %	5.7 %
Aluminium(USD/MT)	1,573	(0.3) %	(11.2) %
Copper(USD/MT)	5,825	(0.2) %	(5.5) %

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: Existing home sales in the US tumbled in the month of May, according to a report released by the National Association of Realtors or NAR on Monday. NAR said existing home sales plunged by 9.7% to an annual rate of 3.91 million in May after plummeting by 17.8% to a rate of 4.33 million in April. China left its benchmark lending rate unchanged for the second straight month at its June fixing on Monday, after the central bank kept borrowing costs on medium-term loans steady last week. The one-year loan prime rate (LPR) remained at 3.85%, while the five-year LPR was also steady at 4.65%. The People's Bank of China (PBOC) rolled over some maturing medium-term loans last week, while keeping interest rates unchanged for the second straight month in a row. UK Household Finance Index, which measures households' overall perceptions of financial well-being, rose to 40.7 in June from 37.8 in May and further above April's near eight-and-a-half-year low, survey data from IHS Markit showed on Monday. UK households were the least negative towards the prospects for their financial health in the coming year since March. The survey showed that there was a tentative signs of an improving trend in financial conditions for households in June. Nonetheless, workplace activity continued to fall sharply in June, although the rate of contraction slowed since May.

Global Equities: US stocks rose on Monday as buying support stayed in place even as the Covid-19 worries hogged limelight.

Indian Economy: The Corporate Affairs Ministry (MCA) has extended by three more months the timeline for compliance with creation of a deposit repayment reserve and investment of a portion of their maturing debentures in 2020-21 in specified liquid instruments. As against the earlier specified deadline of June 30, the MCA has now given three more months, ie up to September 30, 2020 for this compliance. The total area under kharif sowing stood at 131.34 lakh hectares (lh) as on 19th June 2020, recording a spurt of nearly 40% compared to the corresponding week last year, according to data released from Agriculture Ministry. A massive increase has been noted in area under oilseeds which stood at 14.3 lh as against just 1.6 lh in the same period last year - up a whopping 781%.

Equity Markets: The market ended a volatile session with decent gains on Monday, shrugging negative global cues. The firmness in domestic shares was led by strength in financial stocks. The barometer S&P BSE Sensex climbed 179.59 points or 0.52% at 34,911.32. The Nifty 50 index rose 66.80 points or 0.65% at 10,311.20.

Corporate News: Punjab National Bank stated that at Fitch Ratings has affirmed PNB's Issuer Default Rating (IDR), Support Rating (SR) and Support Rating Floor (SRF) while revising the Outlook to Negative from Stable on the Long-Term Issuer Default Rating. Moody's Investor Service further trimmed its growth forecast for India to -3.1% this calendar year compared to 0.2% in April. Asian Paints, Bank of Baroda, Union Bank of India, Berger Paints, Aster DM Healthcare, Ador Welding will be in focus ahead of latest earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	162.3	181.5	86.5
MF(INR cr)	783.4	(136.7)	(65.8)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	4,558	61,490	55,431
F&O(INR cr)	1,266,751	1,626,223	1,349,715

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	31.8	30.8	34.7
NSE VIX	30.5	30.6	37.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,708	1.7 %	19.2 %	Energy	14,676	1.0 %	36.2 %
IT	14,464	(0.2) %	20.1 %	Pharma	10,218	2.2 %	45.4 %
Metals	2,050	2.6 %	31.9 %	Finance	10,663	1.2 %	19.2 %
Auto	6,729	1.4 %	44.5 %	PSU	1,474	3.9 %	14.8 %
FMCG	28,865	0.5 %	9.5 %	Real Estate	215	1.0 %	25.0 %

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>
Indiabulls	242	19.1 %	143.8 %	Wipro	218	(1.8) %	15.1 %
Vodafone I	10	10.4 %	231.1 %	GAIL (Indi)	98	(1.2) %	29.8 %
Bajaj Hold	2,739	8.4 %	56.1 %	DLF	160	(1.1) %	20.7 %
Bandhan Ba	311	7.1 %	59.7 %	ONGC	85	(1.0) %	29.0 %
Page Indus	19,393	7.1 %	16.7 %	HDFC	1,819	(0.9) %	14.9 %

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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