



23 Jun.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,773	0.2 %	6.1 %
BSE SENSEX	52,589	0.0 %	5.1 %
CNX BANK	34,745	(0.4) %	2.6 %
CNX MIDCAP	26,733	0.1 %	10.8 %
CNX SMALLCAP	9,686	0.5 %	16.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,946	0.2 %	10.9 %
S&P 500	4,246	0.5 %	13.1 %
FTSE 100	7,090	0.4 %	7.9 %
HANG SENG	28,310	(0.6) %	3.0 %
NIKKEI	28,884	3.1 %	6.0 %
SHANGHAI COMPOSITE	3,557	0.8 %	1.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.95	0.0 %	1.4 %
EUR/USD	1.19	(0.7) %	(3.3) %
GBP/USD	1.38	(1.1) %	1.1 %
USD/JPY	110.25	(0.2) %	6.9 %
USD/AUD	1.34	1.4 %	3.1 %
USD/SGD	1.35	0.5 %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	2.8 %	54.7 %
Gold(INR/10g)	47,155	0.3 %	(7.6) %
Gold Comex(USD/oz)	1,764	(1.1) %	(9.5) %
SILVER(INR/1Kg)	68,077	0.3 %	(1.1) %
Aluminium(USD/MT)	2,354	(0.9) %	16.9 %
Copper(USD/MT)	9,043	(1.8) %	14.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.1 %	0.6 %

Global Economy: The US Federal Reserve chairman Jerome Powell stated in prepared remarks today that the US economy has shown sustained improvement. Widespread vaccinations have joined unprecedented monetary and fiscal policy actions in providing strong support to the recovery. Indicators of economic activity and employment have continued to strengthen, and real GDP this year appears to be on track to post its fastest rate of increase in decades. Much of this rapid growth reflects the continued bounce back in activity from depressed levels. The sectors most adversely affected by the pandemic remain weak, but have shown improvement. Household spending is rising at a rapid pace, boosted by the ongoing reopening of the economy, fiscal support, and accommodative financial conditions. The US National Association of Realtors (NAR) released a report on Tuesday showing existing home sales saw further downside in the month of May. NAR said existing home sales fell by 0.9% to an annual rate of 5.80 million in May after tumbling by 2.7% to a rate of 5.85 million in April. Existing home sales have plummeted by 12.9 percent since January but are still up by 44.6% compared to May of 2020. UK public sector net borrowing decreased to GBP 24.33 billion in May from GBP 43.76 billion in the previous year, data from the Office for National Statistics showed on Tuesday. Nonetheless, this was the second highest May borrowing since records began in 1993.

Global Equities: The US stocks stayed supported in choppy trades. The tech-heavy Nasdaq has reached new record intraday high.

Indian Economy: Crude oil production in India during May, 2021 was 2437.96 TMT which is 5.47% lower than target for the month and 6.32% lower when compared with production of May, 2020. Cumulative crude oil production during April-May, 2021 was 4931.21 TMT which is down 2.23% compared to target for the period and down 4.22% compared production during corresponding period of last year respectively. Natural gas production during May, 2021 was 2739.65MMSCM which is 19.11% higher when compared with production of May, 2020 but 4.09% lower than the monthly target. Cumulative natural gas production during April-May, 2021 was 5391.14MMSCM which is 20.84% higher than production during corresponding period of last year but 2.61% lower when compared with target for the period.

Equity Markets: The main equity indices ended a volatile session with minor gains on Tuesday. After opening above the 15,800 mark, the Nifty hit a high of 15,895.75 in morning trade, but pared gains as the session progressed. A strong bout of profit selling in late trade dragged the 50-unit index below the 15,800 mark. Auto and IT stocks were in demand while realty, banks and FMCG shares declined.

Corporate News: FMCG major HUL has added 30% more capacity in its supply chain, making it more flexible and agile, while adding alternate sources in order to meet the challenges in case of a third wave of COVID-19, its Chairman and Managing Director Sanjiv Mehta said on Tuesday. IT counters will continue to be in focus as the Indian Rupee added to recent losses as the recent spurt in the US dollar weighed on the local currency. The INR closed at 74.37 per US dollar, down 27 paise on the day. Bharat Electronics reported higher consolidated profit at Rs 1,368.15 crore in Q4FY21 against Rs 1,046.97 crore in Q4FY20 while its revenue jumped to Rs 6,917.47 crore from Rs 5,816.77 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(128.8)	107.9	17.2
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)	70,455	80,045	75,842
F&O(INR cr)	4,430,681	4,630,340	4,534,068

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.7	17.4	18.3
NSE VIX	14.7	15.3	19.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,745	(0.4) %	2.6 %	Energy	20,491	0.3 %	10.7 %
IT	28,524	0.6 %	9.8 %	Pharma	14,095	0.1 %	13.9 %
Metals	5,119	0.3 %	22.2 %	Finance	16,509	(0.2) %	3.8 %
Auto	10,540	1.3 %	5.2 %	PSU	2,479	0.1 %	11.9 %
FMCG	36,300	(0.2) %	4.1 %	Real Estate	349	(0.7) %	4.1 %

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>
Piramal En	2,446	5.4 %	37.4 %	SBI Cards	976	(2.4) %	0.1 %
Maruti Suz	7,265	5.3 %	4.9 %	Berger Pai	808	(2.3) %	5.8 %
Adani Tran	1,367	5.0 %	36.8 %	Info Edg.(4,873	(2.1) %	14.3 %
Adani Gree	1,167	4.1 %	0.6 %	DLF	297	(1.9) %	1.7 %
ICICI Pru	602	4.0 %	35.6 %	Asian Pain	3,011	(1.9) %	18.0 %

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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