



23 Jun.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,413	(1.4) %	(12.8) %
BSE SENSEX	51,823	(1.4) %	(12.6) %
CNX BANK	32,845	(1.0) %	(11.6) %
CNX MIDCAP	25,768	(1.6) %	(14.5) %
CNX SMALLCAP	8,139	(1.4) %	(23.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,483	(0.2) %	(16.1) %
S&P 500	3,760	(0.1) %	(21.1) %
FTSE 100	7,089	(0.9) %	(5.5) %
HANG SENG	21,008	(2.6) %	(9.7) %
NIKKEI	26,150	(0.4) %	(10.8) %
SHANGHAI COMPOSITE	3,267	(1.2) %	(10.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	77.86	0.1 %	4.7 %
EUR/USD	1.05	0.3 %	(7.5) %
GBP/USD	1.22	0.3 %	(9.5) %
USD/JPY	134.99	(0.1) %	17.3 %
USD/AUD	1.44	(0.4) %	4.4 %
USD/SGD	1.39	(0.3) %	2.8 %

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)	1,830	(0.7) %	0.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,520	2.3 %	(10.5) %
Copper(USD/MT)	9,000	1.4 %	(6.8) %

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	0.0 %	1.7 %

Global Economy: Euro area consumer confidence unexpectedly eroded in June, after a modest improvement in the previous month, preliminary survey data from the European Commission showed. The flash consumer confidence dropped to -23.6 from -21.1 in May. The corresponding index for the EU also dropped in June, to -24.0 from -22.2 in May. Both indicators are well below their long-term averages of -11.0 and -10.6, respectively, and closer to the record low recorded in April 2020, at the beginning of the COVID-19 pandemic. The manufacturing sector in Japan continued to expand in June, albeit at a slower rate, the latest survey from Jibun Bank revealed, with a manufacturing PMI score of 52.7. That's down from 53.3 in May, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. The survey also showed that the services index improved to 54.2 in June from 52.6 in May, while the composite index rose to 53.2 from 52.3. The manufacturing sector in Australia continued to expand in June, and at a slightly faster rate, the latest survey from S&P Global revealed, with a manufacturing PMI score of 55.8. That's up from 55.7 in May, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Manufacturing production growth accelerated in June, extending the current sequence of expansion to five months. In line with output expansion, the rate of new order growth quickened. The survey also showed that the services index slipped to 52.6 in June from 53.2 in May, while the composite index eased to 52.6 from 52.9.

Global Indices: The Dow dipped 47.12 points or 0.2 percent to 30,483.13, the Nasdaq slipped 16.22 points or 0.2 percent to 11,053.08 and the S&P 500 edged down 4.90 points or 0.1 percent to 3,759.89.

Indian Economy: India's current account deficit (CAD) for the quarter ended March 22 was sequentially narrowed to 1.5 per cent of GDP as remittances from overseas Indians as well as software exports surged and the outflow from dividend and interest payouts fell, data from the RBI shows. Significantly, CAD at 1.2 percent of GDP for FY'22 at 1.2 percent of GDP turned out to be better than the market forecast at up-to 1.5 percent of the GDP. India's CAD decreased to \$ 13.4 billion (1.5 per cent of GDP) in Q4'2021-22 from \$ 22.2 billion (2.6 per cent of GDP) in Q3'2021-22 according to the preliminary estimates released by the Reserve Bank of India. But it was higher than \$ 8.1 billion (1.0 per cent of GDP) in Q4'2020-21 on account of a sharper rise in trade deficit.

Equity Market: The barometer index, the S&P BSE Sensex, down 709.54 points or 1.35% to 51,822.53. The Nifty 50 index declined 225.50 points or 1.44% to 15,413.30.

Corporate News: IRB Infrastructure Developers has received Rs. 308 crore towards part payment i.e., 75% of the total Arbitration Award from the National Highway Authority of India (NHAI). Vodafone Idea approved raising of funds aggregating up-to Rs. 436.21 crore to Euro Pacific Securities (a Vodafone Group entity and promoter of the company), on a preferential basis.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(150.8)	(344.1)	(261.3)
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)	41,124	48,118	57,728
F&O(INR cr)	10,874,284	10,405,017	10,420,889

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.2	28.2	27.2
NSE VIX	21.3	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	32,845	(1.0) %	(11.6) %	Energy	23,792	(2.3) %	(10.1) %
IT	27,488	(1.2) %	(24.4) %	Pharma	11,939	(1.3) %	(12.1) %
Metals	4,491	(4.9) %	(30.7) %	Finance	15,271	(1.1) %	(12.6) %
Auto	10,881	(0.8) %	1.9 %	PSU	2,402	(0.1) %	(15.3) %
FMCG	36,963	(0.9) %	0.7 %	Real Estate	376	(2.2) %	(20.8) %

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>
Zomato Ltd	68	2.3 %	(19.8) %	Hindalco I	316	(6.7) %	(44.5) %
B P C L	306	1.6 %	(18.3) %	UPL	614	(6.2) %	(21.5) %
Interglobe	1,647	1.2 %	(17.6) %	Vedanta	222	(5.9) %	(45.3) %
Hero Motoc	2,524	1.0 %	12.7 %	Tata Steel	838	(5.3) %	(36.4) %
Indus Towe	209	0.4 %	(5.6) %	NMDC	103	(5.3) %	(38.2) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Flash Manufacturing PMI	23-06-2022	04:30	AUD	-	55.7
French Flash Services PMI	23-06-2022	12:45	EUR	-	58.3
German Flash Manufacturing PMI	23-06-2022	13:00	EUR	-	54.8
ECB Economic Bulletin	23-06-2022	13:30	EUR	-	-
Public Sector Net Borrowing	23-06-2022	11:30	GBP	-	-
Flash Manufacturing PMI	23-06-2022	14:00	GBP	-	54.6
CBI Realized Sales	23-06-2022	15:30	GBP	-	(1)
Flash Manufacturing PMI	23-06-2022	06:00	JPY	-	53.3
Unemployment Claims	23-06-2022	18:00	USD	-	-
Flash Manufacturing PMI	23-06-2022	19:15	USD	-	57
Fed Chair Powell Testifies	23-06-2022	19:30	USD	-	-
Crude Oil Inventories	23-06-2022	20:30	USD	-	-

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