



24 May.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,175	1.8 %	2.1 %
BSE SENSEX	50,540	2.0 %	1.0 %
CNX BANK	34,607	3.8 %	2.2 %
CNX MIDCAP	25,413	0.8 %	5.4 %
CNX SMALLCAP	9,088	0.6 %	9.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,208	0.4 %	11.8 %
S&P 500	4,156	(0.1) %	10.6 %
FTSE 100	7,018	(0.0) %	6.8 %
HANG SENG	28,458	0.0 %	3.6 %
NIKKEI	28,318	0.8 %	3.9 %
SHANGHAI COMPOSITE	3,487	(0.6) %	(0.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.06	(0.1) %	0.1 %
EUR/USD	1.22	(0.1) %	(0.5) %
GBP/USD	1.41	(0.1) %	3.6 %
USD/JPY	108.96	(0.1) %	5.6 %
USD/AUD	1.29	(0.0) %	(0.6) %
USD/SGD	1.33	0.0 %	0.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	2.5 %	33.5 %
Gold(INR/10g)	47,569	0.0 %	(6.7) %
Gold Comex(USD/oz)	1,892	0.6 %	(2.9) %
SILVER(INR/1Kg)	69,875	0.0 %	1.5 %
Aluminium(USD/MT)	2,403	0.5 %	19.3 %
Copper(USD/MT)	10,011	(0.7) %	26.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.0) %	0.7 %

Global Economy: Existing home sales in the US saw a continued decrease in the month of April, according to a report released by the National Association of Realtors (NAR) on Friday. NAR said existing home sales tumbled by 2.7% to an annual rate of 5.85 million in April after plunging by 3.7% to a rate of 6.01 million in March. Germany's private sector activity experienced a slight pick-up in May, driven by an improved performance across services, flash survey results from IHS Markit showed on Friday. The composite output index advanced to 56.2 in May from 55.8 in April. The services Purchasing Managers' Index hit a 10-month high of 52.8 versus 49.9 a month ago. A score above 50 indicates expansion. The manufacturing PMI fell to 64.0 in May from 66.2 in the previous month. UK retail sales expanded 9.2% month-on-month in April, faster than the 5.1% increase in March, driven by the easing of coronavirus restrictions, data published by the Office for National Statistics showed on Friday. Moreover, this was the biggest increase since June 2020, when sales were up 13.9%. Meanwhile, food stores sales dropped 0.9% in April. On a yearly basis, retail sales volume grew sharply by 42.4%, after rising 7.2% in March. Japan overall consumer prices were down 0.4% on year in April, the Ministry of Internal Affairs and communications said on Friday, after slipping 0.2% in March. Core CPI, which excludes volatile food prices, was steady at -0.1% on year. Individually, prices for food, fuel, medical care and communication were all lower - while housing, furniture, clothing, education and recreation were higher. On a seasonally adjusted monthly basis, overall inflation fell 0.4% and core CPI sank 0.5%.

Global Equities: The US stocks ended mixed while the overall sentiments remained steady. Markets fell from their intraday highs with the tech heavy NASDAQ ending down half a percent.

Indian Economy: India's Crude oil production during April, 2021 was 2493.26 TMT which is 1.16% higher than target but 2.07% lower than the production during April, 2020. Natural gas production during April, 2021 was 2651.49 MMSCM which is 22.68% higher than the production during April, 2020 but lower by 1.02% than the monthly target.

Equity Markets: The domestic equity barometers ended with robust gains on Friday, boosted by banks and financial stocks. The Nifty closed above the 15,150 mark. All the sectoral indices on the NSE ended in the green.

Corporate News: Tata Consultancy Services (TCS) has launched TCS Pace Port Amsterdam, a co-innovation and advanced research center designed to help customers successfully navigate their growth and transformation journeys. Hero MotoCorp is set for gradual resumption of operations by starting production at all its manufacturing plants in India from Monday, May 24th. Steel counters could be in focus. Indian Pipe Manufacturers' Association (IPMA) has sought government intervention to regulate the prices of steel, which are trading at an all-time high in India. JSW Steel reported sharply higher consolidated profit at Rs 4,191 crore in Q4FY21 against Rs 188 crore in Q4FY20. The revenue jumped to Rs 26,934 crore from Rs 17,887 crore YoY. Shree Cement reported higher standalone profit at Rs 767.6 crore in Q4FY21 against Rs 588.1 crore in Q4FY20. The revenue increased to Rs 3,930.8 crore from Rs 3,217.5 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	30.6	(33.2)	(64.0)
MF(INR cr)	236.6	128.7	223.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	81,300	77,862	74,040
F&O(INR cr)	2,837,985	4,350,507	4,531,593

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.7	20.5	18.7
NSE VIX	19.1	20.6	21.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,607	3.8 %	2.2 %	Energy	19,326	0.9 %	4.4 %
IT	26,105	0.8 %	0.5 %	Pharma	13,994	0.2 %	13.1 %
Metals	5,099	0.4 %	21.7 %	Finance	16,340	3.2 %	2.7 %
Auto	10,312	0.8 %	2.9 %	PSU	2,348	3.8 %	6.0 %
FMCG	34,691	0.6 %	(0.5) %	Real Estate	321	1.2 %	(4.5) %

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	1,454	4.9 %	45.5 %	Havells In	1,028	(4.1) %	(2.8) %
HDFC Bank	1,497	4.5 %	0.7 %	Bosch	15,288	(3.5) %	7.8 %
St Bk of I	401	4.3 %	8.2 %	Marico	460	(2.0) %	12.9 %
IndusInd B	1,016	4.2 %	2.3 %	NMDC	176	(1.4) %	27.3 %
ICICI Bank	642	3.9 %	8.1 %	Info Edg.(4,334	(1.4) %	1.7 %

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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