



24 Jun.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,471	0.0 %	26.9 %
BSE SENSEX	35,430	1.5 %	25.3 %
CNX BANK	22,265	0.0 %	22.3 %
CNX MIDCAP	15,022	0.0 %	31.0 %
CNX SMALLCAP	4,756	0.0 %	34.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,156	0.5 %	(8.3) %
S&P 500	3,131	0.4 %	(3.1) %
FTSE 100	6,320	1.2 %	(16.9) %
HANG SENG	24,907	1.6 %	(12.7) %
NIKKEI	22,549	0.5 %	(2.8) %
SHANGHAI COMPOSITE	2,971	0.2 %	(3.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.35	(0.8) %	5.8 %
EUR/USD	1.13	0.8 %	0.7 %
GBP/USD	1.25	0.8 %	(5.3) %
USD/JPY	106.79	(0.1) %	(1.7) %
USD/AUD	1.44	(1.1) %	1.2 %
USD/SGD	1.39	(0.3) %	3.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	40	(0.9) %	(34.0) %
Gold(INR/10g)	47,942	0.0 %	22.9 %
Gold Comex(USD/oz)	1,787	0.7 %	15.8 %
SILVER(INR/1Kg)	48,355	(0.7) %	5.0 %
Aluminium(USD/MT)	1,578	0.3 %	(11.0) %
Copper(USD/MT)	5,895	1.2 %	(4.4) %

**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:** Global trade volumes shrank around 18.5% year-on-year in the three months to June when the coronavirus pandemic and the subsequent lockdown restrictions were at their peak in most countries, the World Trade Organisation said Tuesday. In the first quarter, the merchandise trade volume decreased 3%. US new home sales spiked by 16.6% to an annual rate of 676,000 in May from a significantly downwardly revised rate of 580,000 in April. The median sales price of new houses sold in May was \$317,900, up 4.9% from \$303,000 in April and up 1.7 percent from \$312,700 in the same month a year ago. Euro area private sector contracted at a slower pace in June as lockdowns to prevent the spread of the coronavirus disease outbreak were further relaxed, flash survey results published by IHS Markit showed Tuesday. The flash composite output index advanced to 47.5 from 31.9 in May. The latest gain took the PMI to its highest since February, though still indicated an overall decline in business output. Germany's private sector showed signs of a turnaround in June, flash data from IHS Markit showed Tuesday. The flash composite output index climbed to 45.8 in June from 32.3 in the previous month. UK composite output index rose to 47.6 in June from 30.0 in May, flash survey data from IHS Markit showed Tuesday, largely driven by the manufacturing sector. The latest reading was below the 50.0 no-change threshold, but signaled the slowest pace of decline since the start of the downturn in March. The manufacturing sector in Japan continued to contract in June, the latest survey from Jibun Bank revealed on Tuesday with a manufacturing PMI score of 28.9. Australia's private sector expanded in June. The Commonwealth Bank flash composite output index climbed to 52.6 in June from 28.1 in the previous month.

**Global Equities:** US stocks stayed supported amid elevated risk appetite. US Treasury Secretary Steven Mnuchin said Tuesday he expects China will live up to its trade deal.

**Indian Economy:** Domestic Crude oil production during May, 2020 was 2602.40 TMT which is 3.46% lower than target and 7.06% lower when compared with May 2019. Cumulative crude oil production during April-May, 2020 was 5148.22 TMT which is 2.47% and 6.71% lower than target for the period and production during corresponding period of last year respectively. Natural gas production during May, 2020 was 2300 MMSCM which is 11.32% lower than the monthly target and 16.02% lower when compared with May, 2019. Cumulative natural gas production during April-May, 2020 was 4461.33 MMSCM which is 11.11% and 17.30% lower than target for the period and production during corresponding period of last year respectively. The interventions by Government for MSMEs, have been gaining rapid traction. Under the Emergency Credit Line backed by a Government guarantee, Banks have sanctioned loans worth over Rs. 79,000 crore as of June 20, 2020, of which more than Rs 35,000 crore has already been disbursed.

**Equity Markets:** Domestic shares ended sharply higher on Tuesday amid positive global cues. The barometer S&P BSE Sensex jumped 519.11 points or 1.49% at 35,430.43. The Nifty 50 index rallied 159.80 points or 1.55% at 10,471. Both the indices have risen almost 6% in four straight sessions.

**Corporate News:** Larsen & Toubro (L&T) said its construction arm has won contracts worth Rs 1,310 crore in various business segments. Bank of Baroda reported a profit of Rs 506.6 crore in Q4FY20 on lower provisions, higher operating income and tax write-back. Net interest income during the quarter under review increased 5% year-on-year to Rs 6,798 crore. GAIL India, Indian Oil Corporation, Power Finance Corporation and Canara Bank will be in focus ahead of latest earnings today.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	56.6	173.7	85.9
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)	2,250	58,005	54,446
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	29.3	30.5	37.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	22,265	2.6 %	22.3 %	Energy	14,838	1.1 %	37.7 %
IT	14,680	1.5 %	21.9 %	Pharma	10,361	1.4 %	47.4 %
Metals	2,086	1.8 %	34.3 %	Finance	10,881	2.1 %	21.7 %
Auto	6,789	0.9 %	45.8 %	PSU	1,524	3.4 %	18.8 %
FMCG	29,355	1.7 %	11.4 %	Real Estate	221	2.9 %	28.6 %

### 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>
Bandhan Ba	351	12.7 %	80.0 %	United Spi	622	(2.0) %	34.5 %
Larsen & T	968	6.6 %	25.0 %	Power Fin.	89	(1.5) %	0.3 %
Bajaj Hold	2,919	6.6 %	66.4 %	Reliance I	1,721	(1.4) %	60.8 %
Bajaj Fina	3,026	6.5 %	36.3 %	Petronet L	260	(1.1) %	29.8 %
IndusInd B	520	6.2 %	52.1 %	New India	123	(1.1) %	16.6 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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