



25 Jun.2020

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,239	(0.6) %	24.0 %
BSE SENSEX	34,869	(1.6) %	22.3 %
CNX BANK	21,427	0.0 %	17.7 %
CNX MIDCAP	14,810	0.0 %	29.1 %
CNX SMALLCAP	4,671	0.0 %	31.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,446	(2.7) %	(10.8) %
S&P 500	3,050	(2.6) %	(5.6) %
FTSE 100	6,124	(3.1) %	(19.5) %
HANG SENG	24,782	(0.5) %	(13.2) %
NIKKEI	22,534	(0.1) %	(2.9) %
SHANGHAI COMPOSITE	2,980	0.3 %	(3.4) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.37	(0.4) %	5.9 %
EUR/USD	1.13	0.5 %	0.6 %
GBP/USD	1.25	0.5 %	(5.4) %
USD/JPY	106.74	(0.2) %	(1.8) %
USD/AUD	1.45	(0.3) %	1.6 %
USD/SGD	1.39	(0.3) %	3.3 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	38	(5.8) %	(37.9) %
Gold(INR/10g)	48,389	0.9 %	24.1 %
Gold Comex(USD/oz)	1,775	(0.7) %	15.0 %
SILVER(INR/1Kg)	48,506	0.3 %	5.3 %
Aluminium(USD/MT)	1,564	(0.9) %	(11.7) %
Copper(USD/MT)	5,871	(0.4) %	(4.8) %

## 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	(0.1) %	(1.3) %

**Global Economy:** The International Monetary Fund (IMF) estimated a deeper recession for this year and a slower and uncertain recovery for next year on the coronavirus pandemic. The global economy is set to shrink 4.9% this year, which is worse than the 3% contraction predicted in April, the lender said in an update to its World Economic Outlook. That would be the most severe recession since the Great Depression of the 1930s. Private consumption is expected to be weaker than expected, reflecting a combination of a large adverse aggregate demand shock from social distancing and lockdowns as well as a rise in precautionary savings. German business climate index rose to 86.2 points from 79.7 points in May, revised from 79.5, as lockdown restrictions imposed to slow the spread of the coronavirus were eased across Europe, survey data from the ifo institute showed on Wednesday. This is the strongest increase ever recorded, the think tank said. The index rose for a second straight month. The Japan leading index fell to the lowest in over eleven years in April. The leading index, which measures the future economic activity, fell to 77.7 in April from 85.1 in March. According to the initial estimate, the reading was 76.2. The coincident index that reflects the current economic activity also slipped to 80.1 in April from 88.8 a month ago. The assessment of the coincident index was "worsening", the Cabinet Office said. The Bank of Japan reportedly noted that it is still unclear when the spread of COVID-19 will subside on a global basis, as the spread is continuing in emerging economies in particular. New Zealand's monetary policy committee on Wednesday, decided to hold its interest rate at a record low 0.25%, as social restrictions to contain the spread of coronavirus were relaxed and domestic operations resumed earlier than expected.

**Global Equities:** US stocks tanked as traders eyed rising Covid-19 cases and the general worries over economic growth.

**Indian Economy:** The International Monetary Fund (IMF) said Indian economy will contract 4.5% in FY21, reversing its earlier forecast in April of 1.9% growth for the same year, citing the larger-than anticipated disruption to domestic activity in Asia's third largest economy due to a more severe nationwide lockdown. India Ratings also projected the Indian economy to contract by 5.3% in FY21. Nitin Gadkari, Minister of Road Transport & Highways and Micro, Small and Medium Enterprises, Govt of India said that priority of the government is to develop indigenous, low carbon, sustainable, economically viable, pollution-free and cost-effective transportation system, which also provides comfort to the poor people of the country.

**Equity Markets:** The Sensex and the Nifty corrected sharply on Wednesday, after rising almost 6% in the past four sessions. Banks and pharma shares tumbled due to profit booking.

The barometer S&P BSE Sensex tumbled 561.45 points or 1.58% at 34,868.98. The Nifty 50 index slumped 165.70 points or 1.58% at 10,305.30.

**Corporate News:** Oil marketing companies can be in focus after a near 7% tumble in prices in the US session. Coal India's exploration arm has added 7.8 billion tonnes of coal to India's proven reserves base in 2019-20, the largest addition in a year so far, it said in a report. Apollo Hospitals Enterprises, Ashok Leyland, Bank of India, Container Corporation of India, Endurance Technologies, Engineers India, Insecticides India and Indian Overseas Bank will be in focus ahead of latest earnings.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	17.1	164.5	84.6
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)	7,586	55,204	53,594
F&O(INR cr)	2,255,548	1,647,657	1,366,784

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.8	31.0	34.6
NSE VIX	29.6	30.5	37.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,427	(3.8) %	17.7 %	Energy	14,604	(1.6) %	35.6 %
IT	14,581	(0.7) %	21.0 %	Pharma	10,111	(2.4) %	43.9 %
Metals	2,042	(2.1) %	31.5 %	Finance	10,557	(3.0) %	18.1 %
Auto	6,743	(0.7) %	44.8 %	PSU	1,497	(1.8) %	16.7 %
FMCG	29,487	0.5 %	11.9 %	Real Estate	215	(2.6) %	25.2 %

### 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>
Page Indus	20,754	8.2 %	24.9 %	Indiabulls	208	(13.4) %	109.5 %
Adani Tran	255	5.0 %	34.5 %	ICICI Bank	348	(7.5) %	11.9 %
Berger Pai	541	4.9 %	11.9 %	IndusInd B	482	(7.4) %	40.7 %
Asian Pain	1,747	3.8 %	9.0 %	Bandhan Ba	331	(5.6) %	70.0 %
ITC	192	3.2 %	15.3 %	DLF	160	(5.1) %	20.7 %

### 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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