



26 May.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,039	(0.7) %	9.5 %
BSE SENSEX	30,673	(0.8) %	8.5 %
CNX BANK	17,279	(2.6) %	(5.1) %
CNX MIDCAP	12,668	(0.7) %	10.4 %
CNX SMALLCAP	3,851	(0.6) %	8.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,465	(0.0) %	(14.3) %
S&P 500	2,955	0.2 %	(8.5) %
FTSE 100	5,993	(0.4) %	(21.2) %
HANG SENG	22,952	0.1 %	(19.6) %
NIKKEI	20,742	1.7 %	(10.6) %
SHANGHAI COMPOSITE	2,818	0.2 %	(8.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.28	0.4 %	5.7 %
EUR/USD	1.09	(0.5) %	(2.7) %
GBP/USD	1.22	(0.3) %	(7.6) %
USD/JPY	107.56	(0.1) %	(1.0) %
USD/AUD	1.53	0.5 %	7.3 %
USD/SGD	1.42	0.5 %	5.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	33	(2.0) %	(45.7) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,754	0.7 %	13.7 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,473	(0.9) %	(16.9) %
Copper(USD/MT)	5,243	(2.7) %	(15.0) %

**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) %	(1.3) %

**Global Economy:** Germany's business confidence improved in May driven by modest expectations of an economic revival, thanks to partial withdrawal of lockdown restrictions that were imposed to slow the spread of the Covid-19. The IFO business confidence index climbed to 79.5 from a record low 74.2 in April, which was revised from 74.3, survey results from IFO Institute showed Monday. German economy contracted at the fastest pace since the global financial crisis, as initially estimated, due to the coronavirus pandemic, revised data from Destatis showed on Monday. Gross domestic product fell 2.2% sequentially, the biggest fall since the first quarter of 2009 and the second biggest since the German unification. The rate came in line with the estimate. Japan leading index declined less than expected in March, but the reading was the lowest since mid-2009, final data from the Cabinet Office showed Monday. The leading index, which measures the future economic activity, declined to 84.7 in March from 91.9 in the previous month.

**Global Markets:** European stocks surged amid optimism the economies will start recovering thanks to lifting of lockdown measures. US markets were shut for a public holiday.

**Indian Economy:** India's crude oil processing in April tanked by 28.8% from a year ago, its biggest drop in nearly 17 years. Refiners processed about 14.75 million tonnes or 3.60 million barrels per day (bpd) of oil last month. Cotton Association of India (CAI) released its April estimate of the cotton crop for the season 2019-20 beginning from 1st October 2019. The CAI has reduced its cotton crop estimate for 2019-20 to 330 lakh bales of 170 kgs. each as against 354.50 lakh bales estimated by it earlier. The cotton crop finalised by the CAI for the last year i.e. for the crop year 2018-19 was 312.00 lakh bales of 170 kgs. each.

**Equity Markets:** Key domestic benchmarks corrected on Friday, snapping their three-day rising streak. Weak global cues and rising COVID-19 cases in Indian triggered selling. Shares of banks and financial firms tumbled after the central bank extended loan moratorium by three more months. RBI Governor's projection of a likely negative GDP growth in FY21 further impacted sentiment. The barometer S&P BSE Sensex fell 260.31 points or 0.84% at 30,672.59. The Nifty 50 index lost 67 points or 0.74% at 9,039.25.

**Corporate News:** HDFC Ltd on Monday reported a 10% drop in consolidated net profit to Rs 4,341.58 crore for the fourth quarter ended March 31. The company's net profit (before adjustment of minority interest) was Rs 4,811.26 crore in January-March quarter of 2018-19. The board has proposed a dividend of Rs 21 per share of the face value of Rs 2 per unit. The demand for home loans will rebound in the medium term as Covid-19 pandemic is changing working habits, the lender noted. Bharti Telecom, the parent company of Bharti Airtel, plans to raise \$1 billion (around Rs 7,600 crore) through a block deal with a floor price of Rs 558 per equity share. JSW Steel has ramped up capacity utilisation to 85% in May after restarting operations about a month ago.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(27.2)	64.3	26.8
MF(INR cr)	706.0	(59.3)	(289.2)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	51,100	53,653	51,312
F&O(INR cr)	833,372	1,230,912	1,186,275

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.2	31.6	37.0
NSE VIX	32.4	38.3	42.1

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	17,279	(2.6) %	(5.1) %	Energy	12,464	(0.3) %	15.7 %
IT	13,843	1.4 %	14.9 %	Pharma	9,601	0.8 %	36.6 %
Metals	1,710	(1.9) %	10.1 %	Finance	8,652	(3.1) %	(3.3) %
Auto	5,767	0.3 %	23.8 %	PSU	1,090	(0.9) %	(15.0) %
FMCG	27,786	(0.4) %	5.4 %	Real Estate	164	(1.2) %	(5.0) %

### 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>
Zee Entert	163	6.0 %	35.0 %	Shriram Tr	541	(5.9) %	(12.9) %
M & M	426	4.4 %	56.3 %	Axis Bank	337	(5.7) %	(6.1) %
Bajaj Hold	1,994	4.4 %	13.6 %	Ashok Leyl	44	(5.4) %	6.1 %
Cipla	639	3.7 %	54.5 %	Power Fin.	75	(5.4) %	(15.8) %
Shree Ceme	19,910	3.4 %	20.3 %	H D F C	1,516	(5.1) %	(4.3) %

### 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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