



26 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,368	0.8 %	25.6 %
BSE SENSEX	34,842	(0.1) %	24.2 %
CNX BANK	21,718	1.0 %	19.3 %
CNX MIDCAP	15,108	1.1 %	31.7 %
CNX SMALLCAP	4,742	1.0 %	33.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,746	1.2 %	(9.8) %
S&P 500	3,084	1.1 %	(4.6) %
FTSE 100	6,147	0.4 %	(19.2) %
HANG SENG	24,782	(0.5) %	(13.2) %
NIKKEI	22,260	(1.2) %	(4.1) %
SHANGHAI COMPOSITE	2,980	0.3 %	(3.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.30	(0.1) %	5.8 %
EUR/USD	1.12	(0.6) %	0.1 %
GBP/USD	1.24	(0.6) %	(5.8) %
USD/JPY	107.19	0.4 %	(1.3) %
USD/AUD	1.46	0.8 %	2.0 %
USD/SGD	1.39	0.0 %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	39	1.9 %	(36.7) %
Gold(INR/10g)	48,021	(0.8) %	23.1 %
Gold Comex(USD/oz)	1,778	0.2 %	15.2 %
SILVER(INR/1Kg)	47,545	(2.0) %	3.2 %
Aluminium(USD/MT)	1,544	(1.3) %	(12.9) %
Copper(USD/MT)	5,881	0.2 %	(4.6) %

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: The US Commerce Department said real gross domestic product tumbled by 5% in the first quarter, unchanged from the estimate provided last month. The steep drop in GDP in the first quarter reflects a notable turnaround from the 2.1% jump seen in the fourth quarter of 2019. US durable goods orders surged by 15.8% in May after plunging by a revised 18.1% in April. US initial jobless claims dropped to 1.480 million, a decrease of 60,000 from the previous week's revised level of 1.540 million. German forward-looking consumer sentiment index rose to -9.6 in July from revised -18.6 in June, reflecting the rapid reopening of the economy after coronavirus related lockdown and economic stimulus package, survey results published by the market research group GfK showed Thursday. Nonetheless, the situation remained difficult and fragile amid a record number of short-time workers and rising unemployment. Moreover, the economy remained in a severe recession. All sub-components namely economic and income expectations, as well as propensity to buy, increased in June. UK retailers reported a steep fall in sales in June but stronger growth for grocers and stable volumes in the specialist food and drink sector ensured a slower pace of decline than in May, the Distributive Trades Survey data from the Confederation of British Industry showed Thursday. A balance of -37% said sales declined in June compared to -50% in May. Japan's all industry activity declined for the third straight month in April, figures from the Ministry of Economy, Trade and Industry showed on Thursday. The all industry activity index slipped 6.4% month-on-month in April, following a 3.4% drop in March. Among components, construction activity remained unchanged on month, after a 1.9% rise in March.

Global Equities: US stocks saw buying amid cautious trades. Financial were supported on reports regulators are set to loosen bank restrictions on investing activities.

Indian Economy: India is expected to grow at 1.3% in the current fiscal in the absence of supply constraints dampening stimulus measures, said a report released by the National Council of Applied Economic Research (NCAER) on Thursday. According to the NCAER's Quarterly Review of the Economy (QRE), the first quarter is likely to have witnessed a 26% contraction. The estimate was based on the detailed sectoral analysis since the lockdown has restricted data availability.

Equity Markets: The Sensex and the Nifty ended with small losses on Thursday. Trading was volatile as the June 2020 F&O contracts expired today, 25 June 2020. IT shares declined while FMCG shares climbed. The barometer S&P BSE Sensex declined 26.88 points or 0.08% at 34,842.10. The Nifty 50 index fell 16.4 points or 0.16% at 10,288.90.

Corporate News: Power Finance Corporation said it sanctioned loans over Rs 1 lakh crore for power projects during the 2019-20 financial year. Out of the Rs 1 lakh crore, it successfully disbursed Rs 68,000 crore loans during the last financial year, PFC said in a statement. ITC, Coal India, Glenmark Pharmaceuticals, Oil India, NALCO, Emami, APL Apollo Tubes, Eris Lifesciences will be in focus ahead of latest earnings today. Apollo Tyres stated that the company commissioned its Andhra Pradesh greenfield facility.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	144.0	163.3	85.7
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)	3,718	52,495	52,703
F&O(INR cr)	4,162,943	1,780,040	1,416,716

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	32.2	31.1	34.6
NSE VIX	29.7	30.4	37.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,506	0.4 %	18.1 %	Energy	14,505	(0.7) %	34.7 %
IT	14,411	(1.2) %	19.6 %	Pharma	10,193	0.8 %	45.1 %
Metals	2,031	(0.6) %	30.7 %	Finance	10,586	0.3 %	18.4 %
Auto	6,738	(0.1) %	44.7 %	PSU	1,489	(0.5) %	16.1 %
FMCG	30,113	2.1 %	14.2 %	Real Estate	213	(1.0) %	23.9 %

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>
Piramal En	1,342	8.2 %	43.3 %	Bajaj Hold	2,683	(5.5) %	52.9 %
ITC	202	5.3 %	21.5 %	Berger Pai	520	(3.8) %	7.6 %
Adani Tran	267	5.0 %	41.2 %	NMDC	84	(3.4) %	7.3 %
Abbott Ind	16,327	4.1 %	4.6 %	Asian Pain	1,689	(3.3) %	5.4 %
Biocon	404	3.7 %	45.2 %	Hindalco I	147	(3.2) %	60.0 %

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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