



27 Jun.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,699	0.9 %	(11.2) %
BSE SENSEX	52,728	0.9 %	(11.0) %
CNX BANK	33,627	1.5 %	(9.5) %
CNX MIDCAP	26,449	1.4 %	(12.2) %
CNX SMALLCAP	8,391	1.8 %	(20.9) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,501	2.7 %	(13.3) %
S&P 500	3,912	3.1 %	(17.9) %
FTSE 100	7,209	2.7 %	(3.9) %
HANG SENG	21,719	2.1 %	(6.7) %
NIKKEI	26,492	1.2 %	(9.6) %
SHANGHAI COMPOSITE	3,350	0.9 %	(7.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	77.98	(0.0) %	4.9 %
EUR/USD	1.05	(0.1) %	(7.4) %
GBP/USD	1.22	(0.1) %	(9.5) %
USD/JPY	135.24	(0.7) %	17.5 %
USD/AUD	1.45	0.4 %	5.4 %
USD/SGD	1.39	0.1 %	3.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	108	3.2 %	39.8 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,829	0.1 %	0.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,436	(1.8) %	(13.5) %
Copper(USD/MT)	8,281	(3.5) %	(14.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.1	0.0 %	1.5 %

Global Economy: Consumer sentiment in the U.S. tumbled by slightly more than initially estimated in the month of June, revised data from the University of Michigan revealed. The report showed the consumer sentiment index for June was downwardly revised to 50.0 from the preliminary reading of 50.2. The consumer sentiment index is down sharply from the final May reading of 58.4, plunging to its lowest level on record. The steep drop by the headline index came as the current economic conditions index plunged to 53.8 in June from 53.3 in May, while the index of consumer expectations tumbled to 47.5 from 55.2. Germany's business sentiment worsened more than expected in June as the war in Ukraine, high inflation and supply chain disruptions triggered fears of recession, survey results from the ifo Institute showed. After rising for two months, the business confidence index dropped to 92.3 in June from 93.0 in the previous month. Companies were somewhat less satisfied with their current business situation and their expectations turned markedly more pessimistic. The current situation index fell to 99.3 from 99.6 but remained above the expected reading of 99.1. At the same time, the expectations index eased unexpectedly to 85.8 from 86.9 in the previous month. UK retail sales declined in May as high cost of living pulled consumer sentiment to a record low and weighed on households' spending in food stores. Retail sales volume dropped 0.5 percent month-on-month in May, reversing a revised 0.4 percent increase in April, the Office for National Statistics said.

Global Indices: The Dow jumped 823.32 points or 2.7 percent to 31,500.68, the Nasdaq surged 375.43 points or 3.3 percent to 11,607.62 and the S&P 500 shot up 116.01 points or 3.1 percent to 3,911.74.

Indian Economy: According to a report by global consulting firm PwC, the Indian media and entertainment industry will grow at an 8.8% CAGR and reach Rs. 4.30 lakh crore (US\$ 54.93 billion) by 2026. According to the report, digital media and advertising will drive growth through deeper penetration of the internet and mobile devices in the domestic market, while traditional media will maintain steady growth. By 2026, TV advertising is expected to be worth more than Rs. 43,000 crore (US\$ 5.49 billion). By 2026, India's OTT video services are expected to be worth Rs. 21,031 crore (US\$ 2.68 billion), with subscription-based services accounting for Rs 19,973 crore (US\$ 2.55 billion) and transactional VOD accounting for Rs. 1,058 crore (US\$ 135.18 million) (video on demand).

Equity Market: The barometer index, the S&P BSE Sensex, up 462.26 points or 0.88% to 52,727.98. The Nifty 50 index gained 142.60 points or 0.92% to 15,699.25.

Corporate News: Zomato approved the acquisition of up to 33,018 equity shares of Blink Commerce (formerly Grofers India) for Rs 4,447.48 crore. The acquisition is at a price of Rs 13,46,986.01 a share. This acquisition is in line with its strategy of investing in the quick commerce business. Welspun Corp has secured various orders to be executed from India and the USA across the Oil & Gas and Water sector, of about 47,000 MT amounting to about Rs 600 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(334.1)	(343.5)	(262.6)
MF(INR cr)	468.7	1,218.4	1,271.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	42,703	47,634	57,247
F&O(INR cr)	5,154,714	11,034,753	10,615,777

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.2	28.3	27.2
NSE VIX	20.6	21.0	20.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,627	1.5 %	(9.5) %	Energy	24,021	1.4 %	(9.2) %
IT	27,778	(0.9) %	(23.6) %	Pharma	12,178	0.4 %	(10.3) %
Metals	4,597	1.6 %	(29.0) %	Finance	15,596	1.3 %	(10.7) %
Auto	11,583	2.0 %	8.5 %	PSU	2,460	2.0 %	(13.2) %
FMCG	37,779	1.2 %	2.9 %	Real Estate	383	0.3 %	(19.2) %

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>
Info Edg.(3,920	4.3 %	(14.8) %	Mindtree	2,832	(2.9) %	(33.3) %
M & M	1,072	4.3 %	29.7 %	L & T Info	4,034	(2.4) %	(34.7) %
SBI Cards	760	3.8 %	(12.8) %	Tech Mahin	981	(1.0) %	(34.0) %
Bajaj Hold	4,659	3.8 %	(13.7) %	ICICI Pru	493	(0.9) %	(3.0) %
Bank of Ba	100	3.6 %	(13.8) %	Avenue Sup	3,412	(0.8) %	(16.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
ECB President Lagarde Speaks	27-06-2022	13:30	EUR	-	-
Core Durable Goods Orders m/m	27-06-2022	08:30	USD	-	0.004
Pending Home Sales m/m	27-06-2022	10:00	USD	-	(0.039)

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