



28 May.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,338	0.2 %	3.2 %
BSE SENSEX	51,115	0.2 %	2.2 %
CNX BANK	35,095	1.2 %	3.7 %
CNX MIDCAP	25,705	0.5 %	6.6 %
CNX SMALLCAP	9,320	1.0 %	12.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,465	0.4 %	12.6 %
S&P 500	4,201	0.1 %	11.8 %
FTSE 100	7,020	(0.1) %	6.8 %
HANG SENG	29,113	(0.2) %	6.0 %
NIKKEI	28,549	(0.3) %	4.7 %
SHANGHAI COMPOSITE	3,609	0.4 %	3.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.75	(0.1) %	(0.3) %
EUR/USD	1.22	0.3 %	(0.2) %
GBP/USD	1.42	0.1 %	3.7 %
USD/JPY	108.81	(0.0) %	5.5 %
USD/AUD	1.29	(0.2) %	(0.6) %
USD/SGD	1.33	(0.3) %	0.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	0.2 %	39.0 %
Gold(INR/10g)	48,690	(0.7) %	(4.6) %
Gold Comex(USD/oz)	1,900	0.9 %	(2.5) %
SILVER(INR/1Kg)	70,582	(1.8) %	2.5 %
Aluminium(USD/MT)	2,360	0.8 %	17.2 %
Copper(USD/MT)	9,965	0.2 %	25.8 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.0 %	0.7 %

**Global Economy:** The US real gross domestic product spiked by 6.4% in the first quarter, unchanged from the estimate provided last month. The US durable goods orders dropped 1.3% in April after jumping by an upwardly revised 1.3% in March. The US pending home sales index tanked by 4.4% to 106.2 in April after surging up by 1.7% to a downwardly revised 111.1 in March. The US Labor Department said initial jobless claims slid to 406,000, a decrease of 38,000 from the previous week's unrevised level of 444,000. The profits of Chinese industrial enterprises surged 57% in April based on year-on-year reporting, sending the profits in the first four months in 2021 up 1.06 times compared with 2020, the National Bureau of Statistics (NBS) revealed on Thursday. German forward-looking consumer confidence index rose to -7.0 in June from revised -8.6 in May, survey results from the market research group GfK showed on Thursday. After a plus of almost 34 points, the economic expectations indicator jumped to 41.1 points, the highest value in more than three years. UK car production increased sharply in April compared to the pandemic hit month in 2020 but remained below its 2019 level, the Society of Motor Manufacturers and Traders, or SMMT, said on Thursday. Factories manufactured 68,306 cars in April compared to just 197 a year ago when Covid restrictions effectively halted manufacturing. The performance was 3.8% below the April 2019%.

**Global Equities:** The US stocks stayed largely supported on continued hopes of the Covid-19 scenario being under control.

**Indian Economy:** The Reserve Bank Of India, in its latest Annual Report, has maintained a cautious stance on local economy. It noted that the pace of contagion in the second wave has been alarming, stretching the health infrastructure in terms of the capacity to handle a surge of this size and speed. The onset of the second wave has triggered a raft of revisions to growth projections, with the consensus gravitating towards the Reserve Bank's projection of 10.5% for the year 2021-22 - 26.2% in Q1, 8.3% in Q2, 5.4% in Q3 and 6.2% in Q4. The pandemic itself, especially the impact and duration of the second wave, is the biggest risk to this outlook. However, upsides also stem from the capex push by the government, rising capacity utilisation and the turnaround in capital goods imports.

**Equity Markets:** Equity indices ended a volatile session with small gains on Thursday. The Nifty managed to close above the 15,300 mark after slipping below that level in the intraday. The index hit record closing high. Banks, IT and metal stocks were in demand while realty shares corrected.

**Corporate News:** Eicher Motors reported sharply higher consolidated profit at Rs 526.14 crore in Q4FY21 against Rs 304.28 crore in Q4FY20. Its revenue jumped to Rs 2,940.33 crore from Rs 2,208.18 crore YoY. Sun Pharma reported higher profit at Rs 894.1 crore in Q4FY21 against Rs 399.8 crore in Q4FY20. Its revenue rose to Rs 8,523 crore from Rs 8,184.9 crore YoY. Vedanta Ltd plans to invest Rs 10,000 crore in setting up an aluminium park in Odisha to facilitate companies that use the metal to set up their manufacturing units in the facility.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	205.3	(1.7)	(46.0)
MF(INR cr)	(659.8)	13.4	163.6

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	126,002	80,693	75,880
F&O(INR cr)	8,762,792	4,515,843	4,592,450

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.4	20.2	18.7
NSE VIX	19.9	20.4	21.1

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,095	1.2 %	3.7 %	Energy	19,295	(0.1) %	4.2 %
IT	27,165	1.1 %	4.6 %	Pharma	14,100	(0.2) %	13.9 %
Metals	5,043	0.8 %	20.4 %	Finance	16,439	0.2 %	3.3 %
Auto	10,486	0.5 %	4.6 %	PSU	2,427	2.8 %	9.6 %
FMCG	34,812	(0.0) %	(0.2) %	Real Estate	331	(1.2) %	(1.3) %

### 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>
Punjab Nat	42	7.4 %	10.3 %	Berger Pai	798	(4.1) %	4.4 %
Piramal En	1,808	6.3 %	1.6 %	DLF	283	(2.7) %	(2.9) %
Shree Ceme	28,066	3.7 %	(6.3) %	H D F C	2,509	(2.3) %	(0.9) %
Adani Tran	1,440	3.4 %	44.1 %	Avenue Sup	3,026	(2.3) %	3.9 %
L & T Info	3,924	3.3 %	(4.6) %	ICICI Lomb	1,446	(2.1) %	0.6 %

### 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>					

..... End of Report .....