



28 Jun.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,832	0.8 %	(10.4) %
BSE SENSEX	53,161	0.8 %	(10.3) %
CNX BANK	33,811	0.5 %	(9.0) %
CNX MIDCAP	26,713	1.0 %	(11.4) %
CNX SMALLCAP	8,562	2.0 %	(19.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,438	(0.2) %	(13.5) %
S&P 500	3,900	(0.3) %	(18.2) %
FTSE 100	7,258	0.7 %	(3.3) %
HANG SENG	22,230	2.4 %	(4.5) %
NIKKEI	26,871	1.4 %	(8.3) %
SHANGHAI COMPOSITE	3,379	0.9 %	(7.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	78.17	0.3 %	5.1 %
EUR/USD	1.06	0.4 %	(7.0) %
GBP/USD	1.23	0.2 %	(9.2) %
USD/JPY	135.17	(0.7) %	17.4 %
USD/AUD	1.44	(0.1) %	4.9 %
USD/SGD	1.39	(0.2) %	2.7 %

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: New orders for U.S. manufactured durable goods increased by more than expected in the month of May, according to a report released by the Commerce Department. The report showed durable goods orders climbed by 0.7 percent in May after rising by 0.4 percent in April. The bigger than expected increase in durable goods orders came as orders for transportation equipment advanced by 0.8 percent in May after climbing by 0.7 percent. Excluding an advance in orders for transportation equipment, durable goods orders still rose by 0.7 percent in May after edging up by 0.2 percent in April. The report also showed orders for non-defense capital goods excluding aircraft, a key indicator of business spending, increased by 0.5 percent in May after rising by 0.3 percent in April. After reporting steep drops in U.S. pending home sales over the past several months, the National Association of Realtors released a report showing an unexpected rebound in pending home sales in the month of May. Pending home sales index climbed 0.7 percent to 99.9 in May after plunging by 4.0 percent to a revised 99.2 in April. A pending home sale is one in which a contract was signed but not yet closed. Normally, it takes four to six weeks to close a contracted sale. China industrial profits declined at a slower pace in May as companies resumed production after the easing of pandemic related restrictions. Industrial profits decreased 6.5 percent on a yearly basis, following April's 8.5 percent decline, the National Bureau of Statistics reported.

Global Indices: The Dow ended down by 62.42 points or 0.2 percent at 31,438.26, coming off the day's high of 31,598.59. The S&P 500 settled lower by 11.63 points or 0.3 percent at 3,900.11, while the Nasdaq closed lower by 83.07 points or 0.72 percent at 11,524.55.

Indian Economy: Wheat procurement under the central pool in Rabi Marketing Season 2022-23 is going smoothly. Upto 26.06.2022, a quantity of 187.86 LMT of wheat has been procured, benefiting about 17.85 Lakh farmers with MSP value of Rs. 37, 852.88 crore. Paddy procurement under central pool is progressing smoothly in Kharif Marketing Season (KMS) 2021-22, in various procuring States/ UTs. Upto 26.06.2022, a quantity of 860.82 LMT of Paddy includes Kharif Crop 755.60 LMT and Rabi Crop 105.22 LMT) has been procured, benefiting 125.36 Lakh farmers with MSP value of Rs.1,68,720.89 crore.

Equity Market: The barometer index, the S&P BSE Sensex, up 433.30 points or 0.82% to 53,161.28. The Nifty 50 index gained 132.80 points or 0.85% to 15,832.05. The Nifty has risen 2.72% in the three sessions.

Corporate News: Star Health and Allied Insurance has signed a corporate agency agreement with IDFC FIRST Bank, for distribution of its health insurance solutions. Under this strategic agreement, Star Health and Allied Insurance will offer its health insurance products to the bank's customers using IDFC FIRST Bank's digital platform and its wide distribution network. Brigade Group has signed a joint development agreement to develop around 2.1 million square feet in Chennai. The project will have a revenue realization of over Rs. 1500 crores in about 5 years.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(269.2)	(334.5)	(262.7)
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)	43,210	47,402	57,009
F&O(INR cr)	6,607,607	10,801,745	10,547,842

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	27.2	28.3	27.2
NSE VIX	21.0	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	33,811	0.5 %	(9.0) %	Energy	24,238	0.9 %	(8.4) %
IT	28,346	2.0 %	(22.0) %	Pharma	12,222	0.4 %	(10.0) %
Metals	4,666	1.5 %	(28.0) %	Finance	15,651	0.4 %	(10.4) %
Auto	11,686	0.9 %	9.5 %	PSU	2,472	0.5 %	(12.8) %
FMCG	38,103	0.9 %	3.8 %	Real Estate	387	0.9 %	(18.6) %

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>
One 97	701	8.2 %	22.8 %	Zomato Ltd	66	(6.6) %	(21.9) %
Mindtree	2,959	4.5 %	(30.3) %	HDFC AMC	1,758	(3.2) %	(22.8) %
NMDC	111	3.4 %	(33.2) %	Biocon	320	(2.1) %	(6.4) %
Adani Gree	1,918	3.2 %	(1.4) %	Cholaman.I	634	(2.1) %	(10.4) %
L & T Info	4,163	3.2 %	(32.6) %	Indus Towe	212	(2.0) %	(4.3) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Retail Sales m/m	28-06-2022	21:30	AUD	-	0.009
German GfK Consumer Climate	28-06-2022	02:00	EUR	-	(26)
ECB President Lagarde Speaks	28-06-2022	04:00	EUR	-	-
MPC Member Cunliffe Speaks	28-06-2022	07:00	GBP	-	-
BRC Shop Price Index y/y	28-06-2022	19:01	GBP	-	0.028
BOJ Core CPI y/y	28-06-2022	01:00	JPY	-	0.014
Retail Sales y/y	28-06-2022	19:50	JPY	-	0.031
Goods Trade Balance	28-06-2022	08:30	USD	-	-
HPI m/m	28-06-2022	09:00	USD	-	0.015
CB Consumer Confidence	28-06-2022	10:00	USD	-	106.4

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