



29 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,383	0.9 %	25.8 %
BSE SENSEX	35,171	0.9 %	24.4 %
CNX BANK	21,592	0.4 %	18.6 %
CNX MIDCAP	14,975	0.2 %	30.5 %
CNX SMALLCAP	4,708	0.3 %	33.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,016	(2.8) %	(12.3) %
S&P 500	3,009	(2.4) %	(6.9) %
FTSE 100	6,159	0.2 %	(19.0) %
HANG SENG	24,550	(0.9) %	(14.0) %
NIKKEI	22,512	1.1 %	(3.0) %
SHANGHAI COMPOSITE	2,980	0.3 %	(3.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.27	(0.0) %	5.7 %
EUR/USD	1.12	(0.1) %	0.0 %
GBP/USD	1.24	(0.3) %	(6.1) %
USD/JPY	107.12	(0.1) %	(1.4) %
USD/AUD	1.46	0.0 %	2.0 %
USD/SGD	1.39	0.0 %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	38	(0.6) %	(37.1) %
Gold(INR/10g)	48,117	0.2 %	23.4 %
Gold Comex(USD/oz)	1,787	0.6 %	15.9 %
SILVER(INR/1Kg)	48,280	1.5 %	4.8 %
Aluminium(USD/MT)	1,582	2.5 %	(10.7) %
Copper(USD/MT)	5,986	1.8 %	(2.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.6	(0.0) %	(1.3) %

Global Economy: An indicator reflecting the current economic situation in the euro area continued to fall in June, data published by Bank of Italy showed on Friday. The eurocoin indicator fell to -0.37 in June from -0.32 in May. The indicator continued to be affected by the contraction in industrial production notwithstanding the improvement in business and consumer confidence, the bank said. Eurozone monetary aggregate M3 grew 8.9% year-on-year in May, which was faster than April's revised 8.2% increase, the European Central Bank said Friday. Similarly, growth in narrow measure, M1, improved to 12.5% from 11.9% in April. The annual growth rate of credit to the private sector increased to 4.9% in May from 4.4% in April, data revealed. Germany's import prices decreased 7% on a yearly basis in May, slower than the 7.4% drop seen in April, data published by Destatis revealed Friday. Month-on-month, import prices advanced 0.3%, the first rise seen so far this year. Prices had declined 1.8% in April. Excluding energy, import prices fell 0.2% on month and declined 1.3% from the same period last year. Consumer sentiment in South Korea edged higher in June; the latest survey from the Bank of Korea showed on Friday with a consumer survey index score of 81.8. This marked a gain from 77.6 in May. Consumer sentiment regarding current living standards was 5 points higher than in May at 84, and the future outlook for living standards was also up 2 points to 87.

Global Equities: Covid- 19 jitters hurt the US stocks on Friday, pulling the DOW lower by 2.80%. The recovery from the coronavirus crisis is set to be incomplete and transformational, European Central Bank President Christine Lagarde stated.

Indian Economy: Domestic power producers' total outstanding dues owed by distribution firms rose nearly 63% to Rs 1.23 lakh crore in April 2020 over the same month previous year. Distribution companies (discoms) owed a total of Rs 75,642 crore to power generation firms in April 2019. The Reserve Bank Of India (RBI) has decided to extend the enhanced borrowing facility provided to the banks to meet their liquidity shortages till September 30. The RBI, as a temporary measure, had increased the borrowing limit of scheduled banks under the marginal standing facility (MSF) scheme from 2% to 3% of their Net Demand and Time Liabilities (NDTL) with effect from March 27, 2020.

Equity Markets: Key domestic benchmarks ended with strong gains on Friday, supported by rally in IT shares. The barometer S&P BSE Sensex rallied 329.17 points or 0.94% at 35,171.27. The Nifty 50 index added 94.10 points or 0.91% at 10,383. Positive global cues boosted sentiment. After hitting an intraday low of 10,311.25 in mid-afternoon trade, the index firmed up once again and touched 10,400 in late trade.

Corporate News: ITC reported a 9% rise in standalone net profit for the quarter ended March at Rs 3,797.08 crore. ITC's revenue from operations dropped though, coming in at Rs 11,420.04 crore from Rs 12,206.03 crore in the corresponding quarter a year ago. Coal India Ltd reported a 23% drop in its consolidated net profit to Rs 4,625 crore for the quarter ended March. The company's sales during the quarter under review were also down by 4% to Rs 25,597 crore as compared to Rs 26,704 crore registered in the same period of FY19.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(68.9)	151.1	82.9
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)	59,859	52,863	52,829
F&O(INR cr)	852,956	1,733,686	1,406,825

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	34.7	31.3	34.6
NSE VIX	28.7	30.4	37.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,592	0.4 %	18.6 %	Energy	14,833	2.3 %	37.7 %
IT	14,995	4.0 %	24.5 %	Pharma	10,138	(0.5) %	44.3 %
Metals	2,043	0.6 %	31.5 %	Finance	10,588	0.0 %	18.4 %
Auto	6,731	(0.1) %	44.5 %	PSU	1,503	0.9 %	17.2 %
FMCG	29,757	(1.2) %	12.9 %	Real Estate	211	(0.9) %	22.7 %

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>
Infosys	748	6.8 %	24.1 %	Bharti Inf	221	(3.4) %	42.2 %
B P C L	394	6.3 %	29.9 %	ITC	195	(3.4) %	17.3 %
TCS	2,119	5.1 %	24.0 %	Bajaj Fina	2,904	(3.4) %	30.8 %
Hindustan	199	4.9 %	24.0 %	Kotak Mah.	1,340	(3.0) %	13.4 %
I O C L	89	4.8 %	12.9 %	United Bre	1,018	(3.0) %	14.4 %

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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