



30 Jun.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,352	0.4 %	25.4 %
BSE SENSEX	34,962	(0.6) %	24.4 %
CNX BANK	21,359	0.0 %	17.3 %
CNX MIDCAP	14,735	0.0 %	28.5 %
CNX SMALLCAP	4,643	0.0 %	31.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,596	2.3 %	(10.3) %
S&P 500	3,053	1.5 %	(5.5) %
FTSE 100	6,226	1.1 %	(18.1) %
HANG SENG	24,301	(1.0) %	(14.9) %
NIKKEI	21,995	(2.3) %	(5.2) %
SHANGHAI COMPOSITE	2,962	(0.6) %	(4.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.23	(0.1) %	5.7 %
EUR/USD	1.12	0.2 %	0.3 %
GBP/USD	1.23	(0.8) %	(6.5) %
USD/JPY	107.41	0.2 %	(1.1) %
USD/AUD	1.46	0.1 %	2.1 %
USD/SGD	1.39	0.1 %	3.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	38	(0.6) %	(37.1) %
Gold(INR/10g)	48,376	0.5 %	24.1 %
Gold Comex(USD/oz)	1,787	0.6 %	15.9 %
SILVER(INR/1Kg)	48,486	0.4 %	5.3 %
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: Eurozone economic sentiment index climbed 8.2 points to 75.7 in June, data published by the European Commission showed Monday. The industrial confidence advanced to -21.7 from -27.5 in the previous month. The reading was forecast to climb to -20.5. The services confidence indicator came in at -35.6 versus -43.6 a month ago. The expected reading was -27.0. Likewise, the consumer sentiment index improved to -14.7 in June, in line with flash estimate, from -18.8 in May. German inflation rose unexpectedly in June from a 45-month low, preliminary data from Destatis revealed Monday. Consumer price inflation climbed to 0.9% in June from 0.6 percent in May. Profits at China's big industrial firms rose in May for the first time since the coronavirus outbreak. In May, the profits of industrial firms saw a year-on-year increase of 6%, from a decrease of 4.3% year-on-year in April. UK mortgage approvals declined unexpectedly to a record low in May as coronavirus pandemic weighed on housing market activity, data published by the Bank of England showed Monday. The number of mortgage approvals for house purchase fell to a new series low of 9,273 in May. This was almost 90% below the February level and around a third of their trough during the financial crisis in 2008. Japan retail sales were down 12.3% on year in May, the Ministry of Economy, Trade and Industry said on Monday, following the 13.7% decline in the previous month. On a monthly basis, retail sales advanced a seasonally adjusted 2.1% on month after sinking a downwardly revised 9.9% in April (originally -9.6%).

Global Equities: Stocks recovered in US following the latest retreat. European markets moved up as traders eyed efforts to kickstart various economies.

Indian Economy: The Centre has further relaxed restrictions in the second phase of unlocking with free intra and inter-state movement and shorter night curfew. RBI stated that keeping in view the continuing of hardships faced by banks in terms of social distancing of staff and consequent strains on reporting requirements, it has now been decided to extend the relaxation of the minimum daily maintenance of the Cash Reserve Ratio of 80% for a further period of three months, i.e., up to September 25, 2020. The total acreage under kharif crops surged to 315.63 lakh hectares (lh) as on 26 June 2020, recording a spurt of 104% compared to 154.53 lh in the corresponding week last year, according to latest sowing data released by the Agriculture Ministry on Friday. The acreage under Rice jumped by around 34% to 37.71 lh. The area under coarse cereals also soared by 96% to 47.96 lh. The Government announced the launch of seven-year Floating Rate Savings Bonds, 2020 (Taxable) scheme commencing from July 1. The coupon on January 1, 2021 will be paid at 7.15%.

Equity Markets: Domestic shares ended with modest losses on Monday on the back of mixed global cues amid rising coronavirus cases. The ongoing Indo-China border tensions also weighed on the investors' sentiment. Weakness in banks and IT shares put pressure on bourses.

Corporate News: Tata Steel posted a consolidated net loss at Rs 1,095.7 crore for the quarter-ended March 2020. It had reported a profit of Rs 2,430.9 crore in the same period last year. Consolidated revenue from operations dropped 20.4% year-on-year to Rs 33,770 crore for the quarter. State-owned Indian Bank said it plans to raise about Rs 5,000 crore through bonds to fund its business growth. GAIL will be in focus as ratings agency Fitch affirmed the company's long-term foreign-currency issuer default rating (IDR) at BBB-. The outlook is negative. ONGC, Vodafone Idea, NBCC, RITES, Deepak Fertilisers, Godfrey Phillips, ICRA will be watched ahead of latest earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(126.9)	137.2	79.2
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)	53,367	52,887	52,838
F&O(INR cr)	956,204	1,696,663	1,399,056

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	34.7	31.3	34.6
NSE VIX	28.9	30.3	36.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	21,359	(1.1) %	17.3 %	Energy	14,589	(1.6) %	35.4 %
IT	14,768	(1.5) %	22.6 %	Pharma	10,136	(0.0) %	44.2 %
Metals	1,990	(2.6) %	28.1 %	Finance	10,533	(0.5) %	17.8 %
Auto	6,646	(1.3) %	42.7 %	PSU	1,453	(3.3) %	13.3 %
FMCG	29,972	0.7 %	13.7 %	Real Estate	204	(3.6) %	18.4 %

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>
Oracle Fin	2,851	4.2 %	48.4 %	Coal India	135	(5.1) %	(3.3) %
Piramal En	1,387	3.3 %	48.1 %	Bank of Ba	49	(5.0) %	(3.9) %
HDFC Bank	1,076	1.9 %	29.7 %	Axis Bank	405	(4.7) %	12.9 %
Britannia	3,519	1.8 %	37.2 %	General In	149	(3.8) %	41.5 %
Cipla	645	1.6 %	55.9 %	NMDC	81	(3.7) %	3.1 %

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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