

Equity Market

- ❖ Sensex up 83 points to 34,371
- ❖ Index VIX rises 3.64% to 29.65
- ❖ Nifty P/E at 23.97, Nifty Midcap 100 P/E at 20.96

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	%chg	52 wkhigh	52 wklow
Nifty 50	10167.5	0.25	12430.5	7511.1
Nifty Mid cap 100	14222.7	0.46	18495.9	10750.0
Nifty Small cap 100	4477.7	1.23	6401.1	3202.9
Bank	21187.4	0.73	32613.1	16116.3
Auto	6610.6	-0.27	8501.2	4452.2
FMCG	29502.2	-0.13	32644.9	22699.1
Pharma	9939.1	-1.41	10234.8	6242.9
Realty	202.7	0.32	336.4	165.4

Factors driving the market

- ❖ OMCs rally on increase in petrol, diesel prices for 2nd day in a row
- ❖ IndusInd Bk up 8% as promoters set to purchase additional shares, IDBI Bank zooms on Rs 135 cr profit in Q4
- ❖ YES Bank gains 11% as Crisil affirms bonds rating at BBB

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
GAIL	105.2	169.3	65.0
IndusInd Bank	453.0	1634.7	235.6
BPCL	395.6	549.0	252.0
Top Losers			
ZEEL	197.0	405.2	114.0
Shree Cement	21228.0	25355.0	15410.0
Eicher Motor	16900.0	23450.0	12450.1

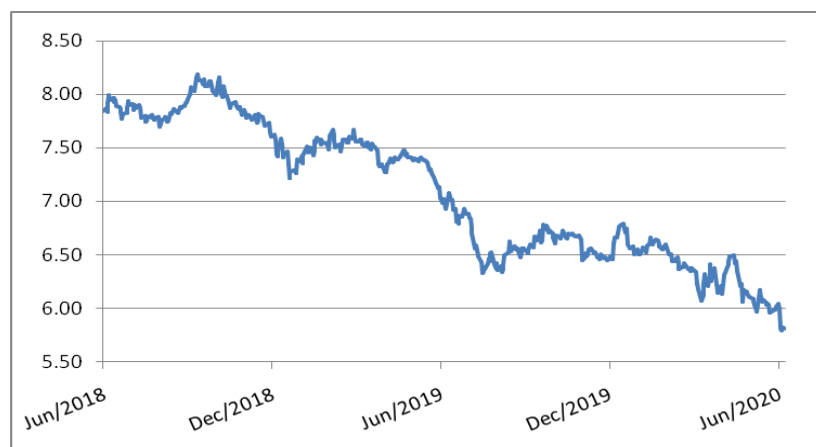
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
08-Jun-20	4611.3	4601.8	9.5
05-Jun-20	8380.6	5756.4	2624.2
04-Jun-20	10111.1	7949.2	2162.0
Total May-2020	130298.5	115729.8	14568.8
Total Apr-2020	120697.5	127581.1	(6883.6)
Total 2019	1437559.6	1336438.9	101120.8

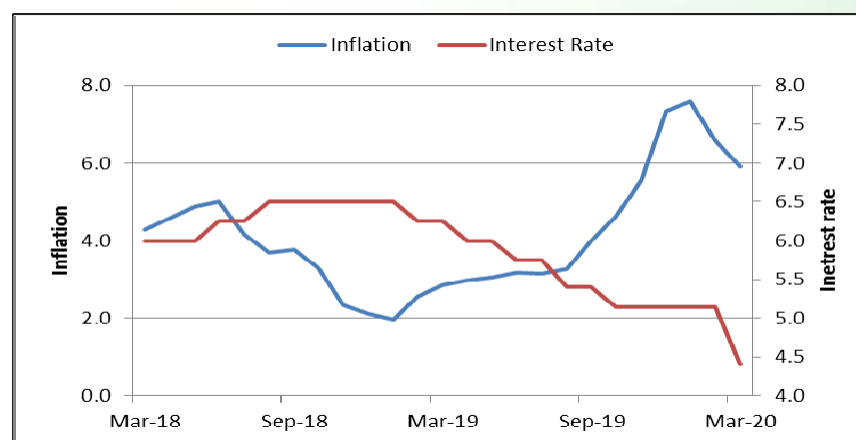
Debt Market

- ❖ RBI proposes deregulation in NPA price discovery
- ❖ SEBI relaxes compliance norms for listing debt securities with regards to disclosure of financial results
- ❖ India's loan growth could hit zero this financial year
- ❖ UPL looking to raise \$500 million through dollar bond issuance
- ❖ M&M allots NCDs worth Rs 500 cr on private placement basis

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	3.14
Repo rate	4.00
10 Yr Gsec yield	5.81
1-mth CP rate	3.55
3-mth CP rate	6.25
6-mth CP rate	5.00
1 Yr CP rate	5.58
1-mth CD rate	3.45
3-mth CD rate	3.50
6-mth CD rate	3.82
1 Yr CD rate	4.25

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Jun-09	G-sec auction	--
Jun-09	Total repo	--
Jun-09	Total reverse repo	6,11,775
Jun-09	Marginal standing facility	50
Jun-09	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
06-Jun-20	239.2	606.6	(367.5)
05-Jun-20	655.6	1308.8	(653.2)
04-Jun-20	469.5	1434.2	(964.8)
Total May-2020	16020.9	38955.9	(22935.0)
Total Apr-2020	16729.7	29281.3	(12551.7)
Total 2019	392458.9	366578.5	25880.4

Debt Fund Benchmark Indices

Market Indices	1 M (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)
Crisil Composite Bond Fund Index	0.91	12.71	8.22	9.27
Crisil Short Term Bond Fund Index	1.09	10.35	8.01	8.39
Crisil ST Debt Hybrid 75+25 Index	3.27	5.49	7.03	8.29
Crisil Liquid Fund Index	0.41	5.94	6.85	7.07

Macro

- ❖ India's tax-GDP ratio plunges to 9.88% in FY20, lowest in 10 years
- ❖ Indian economy to contract by 3.2% this fiscal due to Covid-19: World Bank
- ❖ FM Sitharaman to review credit flow with public sector banks today
- ❖ In the recovery phase, we must have the demand side push coming in: CII President
- ❖ India is mulling a new way to bring its bad loan burden under control

	Q3 FY2020(%)	Q2 FY2020(%)	Q3 FY2019(%)
GDP growth	4.7	4.5	6.6

Commodity Prices				
	Current	Week ago	Month ago	Year ago
Brent crude(\$/bbl)	40.76	38.32	30.97	63.29
Gold (RS/10 gms)	--	--	40,989	31,643

	Mar - 20 (%)	Feb - 20 (%)	Year ago (%) (Mar - 19)
CPI	5.84	6.58	2.86
WPI	1.00	2.26	3.10
Core Sector Output	-6.50	5.50	5.80
IIP	-16.70	4.50	-0.10

Global market trends

- ❖ Nasdaq hits new record on swift economic recovery hopes; Dow up 220 points
- ❖ US entered recession in February, ending record-long expansion: Economists
- ❖ US sanctions on Iran shipping network come into effect: Mike Pompeo
- ❖ New Zealand eradicates Covid-19 as last known infected person recovers
- ❖ UK makes 14-days quarantine mandatory for travellers, airlines protest

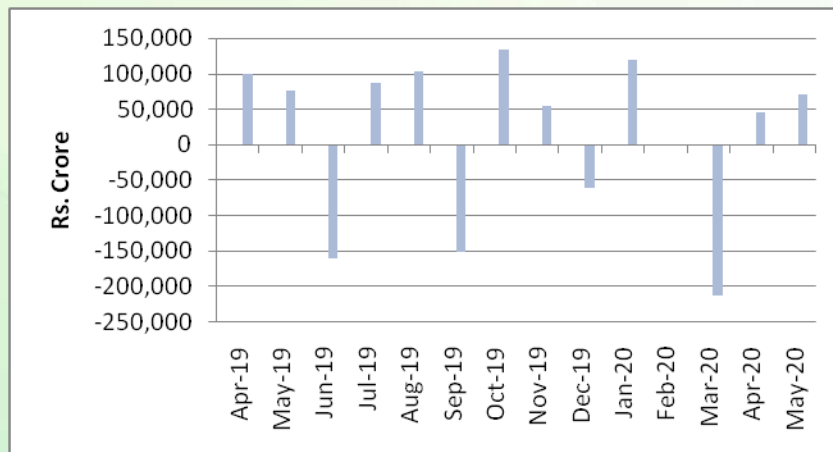
INR vs Global currency		
	Current	Prev close
USD	75.52	75.49
GBP	95.98	96.01
Euro	85.23	85.21
Yen	0.699	0.698
Yuan	10.67	10.66

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	-0.18	4.97	9.04	-11.72
Hang Seng	0.03	4.36	2.26	-8.12
Nikkei 225	1.38	5.06	14.86	10.98
S&P 500	1.20	5.78	10.33	12.50
Shanghai Composite	0.24	0.77	1.47	3.89

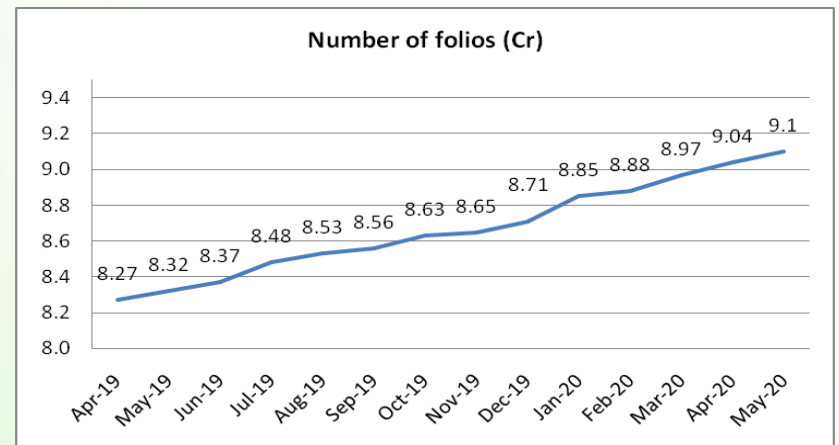
Mutual Fund Roundup

- ❖ Mutual funds witness inflows of Rs 70,813 crore in May 2020
- ❖ Debt funds see inflows of Rs 63,665 Cr, Credit Risk Fund continues to face redemption with outflow of Rs 5173 Cr
- ❖ Equity fund inflows hit 5-month low of Rs 5,257 crore
- ❖ Liquid Fund, Banking and PSU Fund and Arbitrage Fund witness high inflow

Mutual fund inflows



Mutual fund folio growth



(Data source: NSE, NSDL, FIMMDA, investing.com, tradingeconomics.com, fx-rate.net, ACEMF, AMFI, RBI, equitymaster.com)

(News source: Economic Times, Business Standard)

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Mutual Fund investments are subject to market risks, read all scheme related documents carefully.