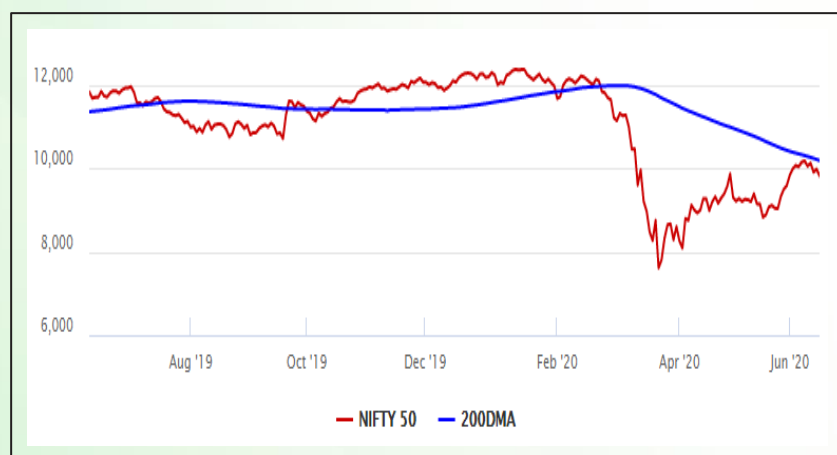


Equity Market

- ❖ Sensex tanks 552 points to 33,229
- ❖ Index VIX jumps 6.14% to 32.58
- ❖ Nifty P/E at 23.69, Nifty Midcap 100 P/E at 21.14

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	%chg	52 wkhigh	52 wklow
Nifty 50	9813.7	-1.60	12430.5	7511.1
Nifty Mid cap 100	14168.6	-1.19	18495.9	10750.0
Nifty Small cap 100	4409.6	0.37	6401.1	3202.9
Bank	19912.9	-3.59	32613.1	16116.3
Auto	6443.0	-1.77	8501.2	4452.2
FMCG	28701.8	-1.52	32644.9	22699.1
Pharma	9989.1	0.06	10237.1	6242.9
Realty	198.5	-3.01	336.4	160.9

Factors driving the market

- ❖ Benchmark indices end lower on weak global cues and a rapid rise in Covid-19 cases
- ❖ RIL partly paid-up shares make strong debut, zoom 10% on NSE
- ❖ M&M gains 9% in two days on firm Q4 operational performance

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
GAIL	99.9	157.4	65.0
Wipro	213.3	301.6	159.4
HCL Tech	579.3	623.5	375.3
Top Losers			
IndusInd Bank	490.4	1596.6	235.6
Axis Bank	389.7	823.4	286.0
Tata Motors	100.7	201.7	63.5

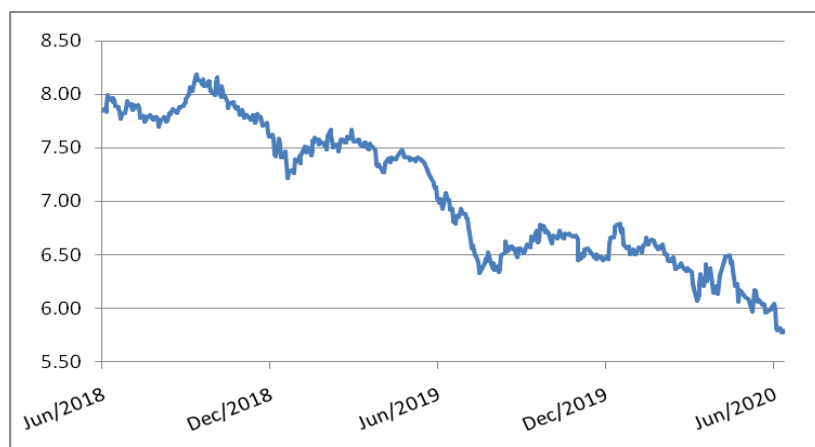
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
15-Jun-20	5401.2	1906.3	494.9
12-Jun-20	5398.3	4540.4	857.8
11-Jun-20	5031.0	5401.5	(370.6)
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

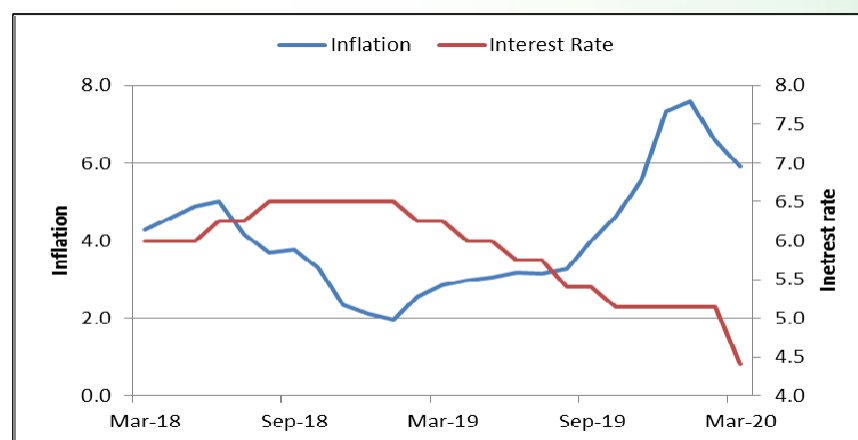
Debt Market

- ❖ Banks approach FinMin, RBI to ease price cap on overseas borrowings
- ❖ IRB Infra Developers raise Rs 300 cr through NCDs
- ❖ ICICI Bank extends paperless overdraft facility to salary account holders
- ❖ RBI has put 44 co-operative banks under watch till now in 2020
- ❖ Adani Green plans upto \$12 bn green bond sales in next 4-5 yrs

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	2.94
Repo rate	4.00
10 Yr Gsec yield	5.79
1-mth CP rate	3.65
3-mth CP rate	4.07
6-mth CP rate	4.21
1 Yr CP rate	5.58
1-mth CD rate	3.21
3-mth CD rate	3.50
6-mth CD rate	4.00
1 Yr CD rate	4.29

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Jun-16	G-sec auction	--
Jun-16	Total repo	--
Jun-16	Total reverse repo	6,39,616
Jun-16	Marginal standing facility	--
Jun-16	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
15-Jun-20	854.6	795.6	59.0
12-Jun-20	782.7	664.0	118.8
11-Jun-20	841.2	917.7	(75.9)
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	1.22	12.52	8.23	9.34
Crisil Short Term Bond Fund Index	1.11	10.49	8.06	8.44
Crisil ST Debt Hybrid 75+25 Index	2.66	4.90	6.82	8.17
Crisil Liquid Fund Index	0.38	5.92	6.84	7.06

Macro

- ❖ EPFO launches multi-location claims settlement facility to expedite process
- ❖ 155 Indian companies create nearly 125,000 jobs in US: CII report
- ❖ Govt may impose anti-dumping duty on polystyrene to guard domestic players
- ❖ Farmers expand area under cotton by 24% on price increase, MSP hike
- ❖ In nine hikes, petrol price goes up by Rs 5 per litre, diesel by Rs 4.87

	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)	39.79	40.76	32.50	62.27
Gold (RS/10 gms)	46,803	46,264	40,989	32,733

	Apr - 20 (%)	Mar - 20 (%)	Year ago (%) (Apr - 19)
CPI	--	5.84	2.92
WPI	--	1.00	3.07
Core Sector Output	-38.12	-6.50	2.60
IIP	-55.50	-16.70	3.40

Global market trends

- ❖ Wall Street mixed as investors weigh spike in virus cases; Dow trades flat
- ❖ Gold steady as second Covid-19 wave fears in Beijing weigh on risky assets
- ❖ China's May industrial output rises 4.4% as economy struggles to recover
- ❖ BP wipes up to \$17.5 billion from assets with bleaker oil outlook
- ❖ JPMorgan, Bank of America, Citi among banks facing US probe over PPP loans

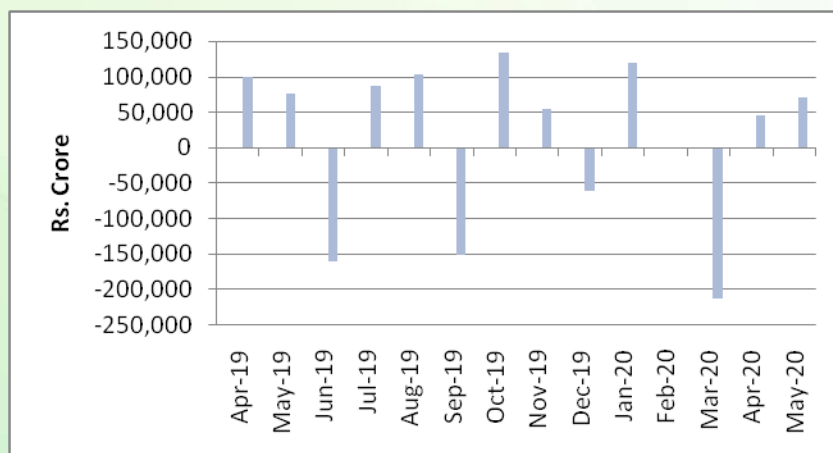
INR vs Global currency		
	Current	Prev close
USD	75.90	75.90
GBP	96.10	95.97
Euro	86.01	86.03
Yen	0.706	0.707
Yuan	10.73	10.72

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	-0.66	-6.30	4.57	-17.44
Hang Seng	-2.16	-4.04	-0.09	-12.32
Nikkei 225	-3.47	-7.11	7.45	1.96
S&P 500	0.83	-5.13	7.08	6.22
Shanghai Composite	-1.02	-1.63	0.75	0.28

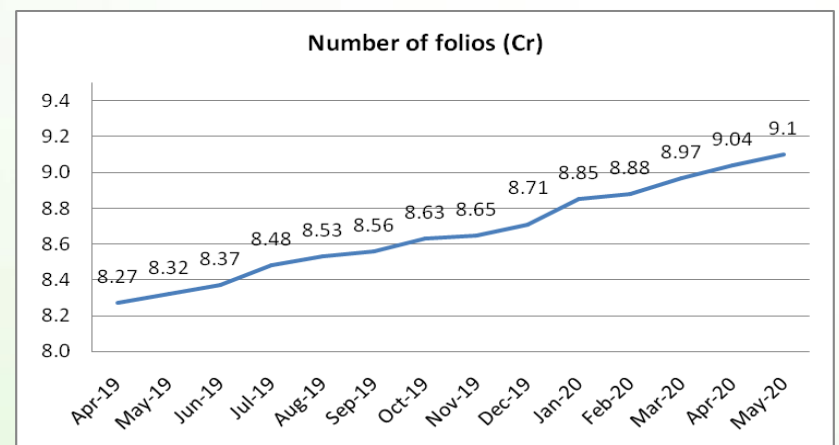
Mutual Fund Roundup

- ❖ MFs receive interest payment from Vodafone ahead of SC hearing
- ❖ Franklin Templeton Mutual Fund suspends e-vote on winding up of six schemes due to court order
- ❖ Debt funds see inflows of Rs 63,665 Cr in May 2020; Equity fund inflows at 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.