



01 Apr.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,691	(1.0) %	78.0 %
BSE SENSEX	49,509	(1.3) %	75.2 %
CNX BANK	33,304	(1.7) %	82.9 %
CNX MIDCAP	23,693	0.4 %	106.5 %
CNX SMALLCAP	8,113	0.4 %	129.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	32,982	(0.3) %	7.8 %
S&P 500	3,973	0.4 %	5.8 %
FTSE 100	6,714	(0.9) %	2.2 %
HANG SENG	28,378	(0.7) %	3.3 %
NIKKEI	29,179	(0.9) %	7.0 %
SHANGHAI COMPOSITE	3,442	(0.4) %	(1.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.24	0.7 %	0.4 %
EUR/USD	1.17	(0.5) %	(4.3) %
GBP/USD	1.37	0.3 %	0.7 %
USD/JPY	110.21	1.0 %	6.8 %
USD/AUD	1.31	(0.4) %	1.2 %
USD/SGD	1.35	0.0 %	2.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(2.3) %	24.2 %
Gold(INR/10g)	44,106	(0.5) %	(13.5) %
Gold Comex(USD/oz)	1,713	1.5 %	(12.1) %
SILVER(INR/1Kg)	63,016	(1.0) %	(8.5) %
Aluminium(USD/MT)	2,213	(0.4) %	9.9 %
Copper(USD/MT)	8,851	0.7 %	11.8 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.0 %	0.8 %

**Indian Equities:** The benchmark indices snapped two-day rising streak and ended with steep losses on Wednesday. The Nifty closed below the crucial 14,700 mark. Banks, financials and IT shares tumbled while FMCG and metal stocks were in demand.

**Corporate News:**

- The output of eight core infrastructure sectors declined 4.6%, compared to last year. The eight core industries also constitute 40.27% of the Index of Industrial Production (IIP).
- Two-wheeler exports of TVS Motor reached 1 lakh units in March, majorly driven by the growth in motorcycle sales in key markets across geographies, the company said in a statement.
- Bank credit offtake in the non-food sector slowed to 6.5% in February 2021 on an annual basis as the impact of the coronavirus pandemic continued to weigh.

**Indian Economy:** The All-India Consumer Price Index for Industrial Workers (CPI-IW) for February, 2021 increased by 0.8 points and stood at 119.0 (one hundred nineteen and point zero). Year-on-year inflation for the month stood at 4.48% compared to 3.15% for the previous month and 6.84% during the corresponding month of the previous year. Similarly, Food inflation stood at 4.64% against 2.38% of the previous month and 8.33% during the corresponding month a year ago.

**Global Economy:** The US National Association of Realtors said its pending home sales index plummeted by 10.6% to 110.3 in February after falling by 2.4% to a revised 123.4 in January. MNI Indicators said its Chicago business barometer soared to 66.3 in March from 59.5 in February, with a reading above 50 indicating growth in regional business activity. ADP said private sector employment surged up by 517,000 jobs in March after climbing by an upwardly revised 176,000 jobs in February. China manufacturing sector continued to expand in March, with a manufacturing PMI score of 51.9, the National Bureau of Statistics said on Wednesday. That beat expectations for 51.0 and was up from 50.6 in February, moving further above the boom-or-bust line of 50 that separates expansion from contraction. The NBS also said its non-manufacturing PMI came in at 56.3, up sharply from 51.4 in the previous month. German unemployment declined in March despite rising infections. The number of people out of work decreased 8,000 from the previous month, when it was up 9,000. The number of unemployed totaled 2.75 million. The jobless rate held steady at 6% in March. UK gross domestic product grew 1.3% sequentially in the fourth quarter instead of +1% estimated initially, data from the Office for National Statistics showed on Wednesday. The economy had expanded sharply by 16.9% in the third quarter. The level of GDP was still 7.3% below its fourth quarter of 2019, revised from the previous estimate of 7.8%. Over the whole year of 2020, GDP contracted by 9.8%, slightly revised from the first estimate of a 9.9% decline. This was the biggest contraction on record. UK house prices increased 5.7% year-on-year in March, slower than the 6.9% growth seen in February, data from the Nationwide Building Society revealed on Tuesday. This was the slowest rise since September 2020. On a monthly basis, house prices fell 0.2%, in contrast to a 0.7% rise in February. Japan's industrial output fell in February. Official data released today showed factory output shrank 2.1% from the previous month in February, dragged down by falls in production of cars, electrical machinery and information and communication equipment.

**Global Equities:** The US stocks saw buying amid choppy trades. IT counters jumped.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	54.6	138.3	154.7
MF(INR cr)	(153.9)	(11.2)	(522.2)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	60,189	71,627	63,172
F&O(INR cr)	3,537,749	4,438,327	2,584,755

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.6	21.9	27.6
NSE VIX	20.7	22.0	25.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,304	(1.7) %	82.9 %	Energy	18,185	(1.3) %	68.8 %
IT	25,855	(1.0) %	114.6 %	Pharma	12,273	0.5 %	74.7 %
Metals	3,977	0.4 %	156.0 %	Finance	15,716	(2.0) %	75.7 %
Auto	9,862	(0.0) %	111.8 %	PSU	2,158	1.3 %	68.2 %
FMCG	34,932	1.0 %	32.5 %	Real Estate	334	1.7 %	94.2 %

### 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>
Adani Tran	908	3.5 %	379.6 %	Adani Gree	1,105	(4.6) %	622.6 %
ICICI Pru	446	3.2 %	30.1 %	Yes Bank	16	(4.3) %	(34.9) %
Ambuja Cem	309	3.0 %	97.2 %	H D F C	2,498	(4.1) %	57.8 %
Bajaj Hold	3,293	3.0 %	87.7 %	HDFC Bank	1,494	(3.9) %	80.0 %
Info Edg.(	4,281	2.9 %	112.5 %	Indus Towe	245	(3.8) %	58.0 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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