



02 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,202	(3.7) %	(4.0) %
BSE SENSEX	38,297	(3.6) %	(1.5) %
CNX BANK	29,147	(3.4) %	(3.9) %
CNX MIDCAP	16,786	(3.4) %	(8.4) %
CNX SMALLCAP	5,675	(4.0) %	(15.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,409	(1.4) %	(11.0) %
S&P 500	2,954	(0.8) %	(8.6) %
FTSE 100	6,796	(3.5) %	(10.6) %
HANG SENG	26,130	(2.4) %	(8.5) %
NIKKEI	21,143	(3.7) %	(8.9) %
SHANGHAI COMPOSITE	2,880	(3.7) %	(6.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.58	(0.1) %	0.5 %
EUR/USD	1.09	0.7 %	(2.4) %
GBP/USD	1.29	(0.4) %	(2.2) %
USD/JPY	1,803.86	1,533.7 %	1,560.3 %
USD/AUD	1.52	0.0 %	6.8 %
USD/SGD	1.40	(0.2) %	3.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	45	(4.9) %	(26.8) %
Gold(INR/10g)	42,352	(0.2) %	8.6 %
Gold Comex(USD/oz)	1,636	0.0 %	6.1 %
SILVER(INR/1Kg)	45,509	(3.1) %	(1.2) %
Aluminium(USD/MT)	1,663	(0.5) %	(6.2) %
Copper(USD/MT)	5,573	(0.8) %	(9.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.2	(0.1) %	(0.8) %

Global Economy: German import prices decreased 0.9% year-on-year in January, following a 0.7% drop in December, decreased for the ninth month in a row in January, data from Destatis showed. German unemployment declined in February, the Federal Employment Agency revealed. The number of people out of work decreased 10,000 in February. UK house price index rose 2.3% year-on-year in February after a 1.9% increase in January, survey data from the Nationwide Building Society showed on Friday. The latest house price inflation was the highest since July 2018, when it was 2.5%. Japan housing starts decreased 10.1% year-on-year in January, following a 7.9% fall in December. This was the seventh consecutive decrease in housing starts. Japan industrial production climbed a seasonally adjusted 0.8% on month in January, following the 1.2% gain in December. On an annual basis, industrial production sank 2.5%.

Global Equities: DOW fell steeply on Friday but recovered after the Federal Reserve said that it is closely monitoring developments and their implications for the economic outlook. Fed also noted that it will use its tools and act as appropriate to support the economy.

Indian Economy: India's GDP rose by 4.7% in the December quarter, its slowest rate in more than six years. This is a slight uptick compared to the September quarter's initial estimate of 4.5%. The core sector growth for January was reported at 2.2% as against 2.1% in December (month on month). Growth had recovered in December 2019 after remaining in the negative zone for four months. India's fiscal deficit in the first 10 months through January stood at Rs 9.85 lakh crore (\$137.05 billion), or 128.5% of the revised budgeted target for the current fiscal year, government data showed on Friday. Net tax receipts in the April-January period were Rs 9.98 lakh crore, while total expenditure was Rs 22.68 lakh crore.

Equity Markets: Domestic stock market nosedived on Friday, mirroring a slump in global markets on fears that the coronavirus outbreak could turn into a pandemic and derail growth. The barometer index, the S&P BSE Sensex tumbled 1448.37 points or 3.64% at 38,297.29. The Nifty 50 index lost 414.10 points or 3.56% at 11,219.20. Selling was broad based. The S&P BSE Mid-Cap index fell 3.33% while the S&P BSE Small-Cap index slipped 3.61%.

Corporate News: IT counters could be in focus as Indian Rupee tanked in last session. INR closed at 72.17 per US dollar, crashing 56 paise on the day. INR fell near a five month low with this slide. Reliance Industries said it has acquired 37.7% stake in textile manufacturer Alok Industries Ltd for Rs 250 crore. Maruti Suzuki India's total sales in the domestic market declined 3.56% in February.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(428.0)	51.6	43.3
MF(INR cr)	(14.5)	249.4	252.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	65,609	40,830	37,482
F&O(INR cr)	1,004,045	1,741,439	1,418,783

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	40.1	19.5	15.3
NSE VIX	23.2	15.4	16.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,147	(3.4) %	(3.9) %	Energy	13,651	(3.0) %	(17.4) %
IT	15,213	(5.6) %	(4.0) %	Pharma	7,577	(3.9) %	(19.2) %
Metals	2,246	(6.8) %	(27.6) %	Finance	13,566	(3.7) %	8.5 %
Auto	6,904	(3.8) %	(18.0) %	PSU	1,946	(5.1) %	(42.5) %
FMCG	29,310	(2.2) %	(2.9) %	Real Estate	281	(3.4) %	5.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vodafone I	4	1.3 %	(78.3) %	Vedanta	114	(12.7) %	(39.7) %
Avenue Sup	2,324	0.2 %	55.7 %	Power Fin.	109	(12.5) %	(8.7) %
I O C L	106	0.1 %	(33.4) %	Indiabulls	280	(11.6) %	(67.0) %
Page Indus	22,146	0.0 %	(13.3) %	Tata Motor	129	(11.2) %	(31.2) %
				L&T Fin.Ho	100	(11.0) %	(34.3) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (FEB)	02-03-2020	11:00	AUD	-	117.7
AiG Performance of Manufacturing Index (FEB)	02-03-2020	3:00	AUD	-	45.4
CBA Australia PMI Mfg (FEB F)	02-03-2020	3:30	AUD	-	49.8
CoreLogic House Px (MoM) (FEB)	02-03-2020	4:30	AUD	-	0.009
TD Securities Inflation (YoY) (FEB)	02-03-2020	5:30	AUD	-	0.018
ANZ Job Advertisements (MoM) (FEB)	02-03-2020	6:00	AUD	-	0.038
MLI Leading Indicator (MoM) (JAN)	02-03-2020	19:00	CAD	-	0.004
RBC Canadian Manufacturing PMI (FEB)	02-03-2020	20:00	CAD	-	50.6
SNB publishes 2019 annual result	02-03-2020	11:55	CHF	-	-
CPI EU Harmonized (YoY) (FEB)	02-03-2020	13:00	CHF	-	0.002
PMI Manufacturing (FEB)	02-03-2020	14:00	CHF	-	47.8
Domestic Sight Deposits CHF (FEB 28)	02-03-2020	14:30	CHF	-	-
Caixin China PMI Mfg (FEB)	02-03-2020	7:15	CNY	-	51.1
Markit/ADACI Italy Manufacturing PMI (FEB)	02-03-2020	14:15	EUR	-	48.9
Markit France Manufacturing PMI (FEB F)	02-03-2020	14:20	EUR	-	49.7
Markit/BME Germany Manufacturing PMI (FEB F)	02-03-2020	14:25	EUR	-	47.8
Italian Annual Gross Domestic Product (2019)	02-03-2020	15:30	EUR	-	-
Consumer Credit (YoY) (JAN)	02-03-2020	15:00	GBP	-	0.061
Vehicle Sales (YoY) (FEB)	02-03-2020	10:30	JPY	-	(0.111)
Company Profits (YoY) (4Q)	02-03-2020	5:20	JPY	-	(0.053)
Markit Mexico PMI Mfg (FEB)	02-03-2020	21:00	MXN	-	49
Terms of Trade Index (QoQ) (4Q)	02-03-2020	3:15	NZD	-	0.019
Treasury Publishes Monthly Economic Indicators	02-03-2020	6:30	NZD	-	-
Markit US Manufacturing PMI (FEB F)	02-03-2020	20:15	USD	-	50.8
ISM Employment (FEB)	02-03-2020	20:30	USD	-	46.6
U.S. to Sell 13-Week Bills	02-03-2020	22:00	USD	-	-

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