



03 Mar.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|----------|
| CNX NIFTY | 11,133 | (0.6) % | (4.6) % |
| BSE SENSEX | 38,144 | (0.4) % | (1.9) % |
| CNX BANK | 28,868 | (1.0) % | (4.8) % |
| CNX MIDCAP | 16,672 | (0.7) % | (9.1) % |
| CNX SMALLCAP | 5,607 | (1.2) % | (16.8) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|-------|----------|
| DOW JONES | 26,703 | 5.1 % | (6.4) % |
| S&P 500 | 3,090 | 4.6 % | (4.4) % |
| FTSE 100 | 6,655 | 1.1 % | (12.5) % |
| HANG SENG | 26,292 | 0.6 % | (7.9) % |
| NIKKEI | 21,344 | 1.0 % | (8.0) % |
| SHANGHAI COMPOSITE | 2,971 | 3.2 % | (3.7) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 72.20 | 0.8 % | 1.4 % |
| EUR/USD | 1.10 | 1.4 % | (1.7) % |
| GBP/USD | 1.28 | (1.1) % | (2.8) % |
| USD/JPY | 108.11 | (2.1) % | (0.5) % |
| USD/AUD | 1.54 | 1.1 % | 7.9 % |
| USD/SGD | 1.39 | (0.3) % | 3.6 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 47 | 4.4 % | (23.6) % |
| Gold(INR/10g) | 42,232 | (0.3) % | 8.3 % |
| Gold Comex(USD/oz) | 1,609 | (1.7) % | 4.3 % |
| SILVER(INR/1Kg) | 45,015 | (1.1) % | (2.3) % |
| Aluminium(USD/MT) | 1,685 | 1.3 % | (4.9) % |
| Copper(USD/MT) | 5,640 | 1.2 % | (8.5) % |

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 | (0.0) % | (0.8) % |

Global Economy: The Organization of Economic Co-operation And Development (OECD) noted today that the coronavirus (COVID-19) outbreak has already brought considerable human suffering and major economic disruption. On the assumption that the epidemic peaks in China in the first quarter of 2020 and outbreaks in other countries prove mild and contained, global growth could be lowered by around 0.50% this year relative to that expected in the November 2019 Economic Outlook, says OECD. Accordingly, annual global GDP growth is projected to drop to 2.4% in 2020 as a whole, from an already weak 2.9% in 2019, with growth possibly even being negative in the first quarter of 2020. The US ISM said its purchasing managers index edged down to 50.1 in February from 50.9 in January. The Caixin/Markit Manufacturing Purchasing Managers' Index showed China's factory activity contracted in February, coming in at a record low of 40.3. Eurozone manufacturing activity contracted only marginally and at the slowest pace for the past year in February, final survey data from IHS Markit showed Monday. The factory Purchasing Managers' Index rose to 49.2 in February from 47.9 in January. This was slightly above the flash score of 49.1. UK manufacturing sector expanded at the fastest pace in ten months in February. The IHS Markit/Chartered Institute of Procurement & Supply Purchasing Managers' Index rose to 51.7 in February from 50.0 in January. Japan manufacturing sector contracted at the fastest pace since 2016. The Jibun Bank manufacturing Purchasing Managers' Index fell to 47.8 in February from 48.8 in January.

Global Equities: Stocks eyed a synchronized global monetary stimulus in near term as the coronavirus continued to spread. DOW jumped 5% amid a sharp recovery.

Indian Economy: The strong manufacturing sector expansion seen in India at the start of the year was maintained in February, with rates of growth for factory orders, exports and output holding close to January's recent highs. While firms were willing to step up input buying, hiring activity increased only fractionally. Meanwhile, business sentiment faded on the back of concerns regarding the impact of the COVID-19 outbreak on exports and supply chains. At the same time, the rate of input cost inflation remained negligible in the context of historical data. At 54.5 in February, the headline seasonally adjusted IHS Markit India Manufacturing PMI held close to January's near eight-year high of 55.3. This signalled another robust improvement in operating conditions across the sector.

Equity Markets: The local market reversed trend and ended with modest losses on Monday after two fresh coronavirus cases were reported in the country. The S&P BSE Sensex, fell 153.27 points or 0.40% at 38,144.02. The Nifty 50 index tumbled 69 points or 0.62% at 11,132.75. Domestic shares traded with sharp gains for most part of the session on hopes that major central banks would take steps to stabilise financial markets amid the coronavirus epidemic. The market reversed its trend sharply in late trade after India's Health Ministry said one positive case of the novel coronavirus (COVID-19) has been detected in Delhi and Telangana each.

Corporate News: Wipro Limited (has been positioned as a leader in Everest Group PEAK Matrix Healthcare IT Security Services Assessment with Service Provider Landscape 2020. Newgen Software, announced that the Indian Patent Office has issued a patent for its system and method for the automatic quality assessment of digital documents (Patent No. 333430). The patent is valid for 20 years until March 24, 2030. Hero MotoCorp reported 19.3% decline in total two-wheeler sales to 498242 units in February 2020 from 617215 units in February 2019. Hero MotoCorp moved ahead to manufacturing only BS-VI vehicles and stopped the production of all BS-IV two-wheelers in the month of February.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (462.8) | 23.0 | 41.1 |
| MF(INR cr) | 4,192.6 | 446.6 | 270.1 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 48,206 | 48,206 | 37,530 |
| F&O(INR cr) | 1,216,934 | 1,216,934 | 1,417,893 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 40.1 | 0 | 15.3 |
| NSE VIX | 25.2 | 25.2 | 16.3 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 28,868 | (1.0) % | (4.8) % | Energy | 13,419 | (1.7) % | (18.8) % |
| IT | 15,428 | 1.4 % | (2.6) % | Pharma | 7,535 | (0.5) % | (19.6) % |
| Metals | 2,198 | (2.2) % | (29.2) % | Finance | 13,520 | (0.3) % | 8.2 % |
| Auto | 6,857 | (0.7) % | (18.5) % | PSU | 1,858 | (4.5) % | (45.1) % |
| FMCG | 29,139 | (0.6) % | (3.5) % | Real Estate | 280 | (0.3) % | 4.7 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Shriram Tr | 1,284 | 7.3 % | 3.8 % | Vodafone I | 3 | (10.4) % | (80.6) % |
| Ashok Leyl | 74 | 5.7 % | (18.2) % | Yes Bank | 32 | (8.8) % | (88.6) % |
| Godrej Con | 587 | 4.8 % | (13.3) % | Bank of Ba | 71 | (6.7) % | (46.4) % |
| Piramal En | 1,357 | 3.8 % | (48.4) % | St Bk of I | 287 | (5.1) % | (11.0) % |
| HCL Techno | 550 | 2.9 % | (1.0) % | Punjab Nat | 43 | (5.1) % | (56.2) % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|---|-------------|------------------|---------------|---------------|-----------------------|
| ANZ Roy Morgan Weekly Consumer Confidence Index (MAR 1) | 03-03-2020 | 4:00 | AUD | - | 108.3 |
| Building Approvals (YoY) (JAN) | 03-03-2020 | 6:00 | AUD | - | 0.027 |
| RBA Cash Rate Target (MAR 3) | 03-03-2020 | 9:00 | AUD | - | 0.0075 |
| Gross Domestic Product (YoY) (4Q) | 03-03-2020 | 12:15 | CHF | - | 0.011 |
| Euro-Zone Consumer Price Index Core (YoY) (FEB P) | 03-03-2020 | 15:30 | EUR | - | 0.011 |
| Markit/CIPS UK Construction PMI (FEB) | 03-03-2020 | 15:00 | GBP | - | 48.4 |
| Consumer Confidence Index (FEB) | 03-03-2020 | 10:30 | JPY | - | 39.1 |
| Loans & Discounts Corp (YoY) (JAN) | 03-03-2020 | 5:20 | JPY | - | 0.0179 |
| QV House Prices (YoY) (FEB) | 03-03-2020 | 21:30 | NZD | - | 0.044 |

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