



03 May.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,631	(1.8) %	(1.6) %
BSE SENSEX	48,782	(2.0) %	(2.5) %
CNX BANK	32,782	(2.8) %	(3.2) %
CNX MIDCAP	24,196	(0.4) %	0.3 %
CNX SMALLCAP	8,565	(0.4) %	3.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,875	(0.5) %	10.7 %
S&P 500	4,181	(0.7) %	11.3 %
FTSE 100	6,970	0.1 %	6.1 %
HANG SENG	28,725	(2.0) %	4.6 %
NIKKEI	28,813	(0.8) %	5.7 %
SHANGHAI COMPOSITE	3,447	(0.8) %	(1.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.08	(0.5) %	1.5 %
EUR/USD	1.21	0.3 %	(1.1) %
GBP/USD	1.39	0.4 %	2.2 %
USD/JPY	108.84	0.0 %	5.5 %
USD/AUD	1.29	(0.3) %	(0.9) %
USD/SGD	1.33	(0.0) %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	1.8 %	36.5 %
Gold(INR/10g)	47,569	0.0 %	(6.7) %
Gold Comex(USD/oz)	1,773	(0.9) %	(9.0) %
SILVER(INR/1Kg)	69,875	0.0 %	1.5 %
Aluminium(USD/MT)	2,432	1.7 %	20.8 %
Copper(USD/MT)	9,990	1.6 %	26.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.0 %	0.7 %

Global Economy: University of Michigan on Friday showed consumer sentiment in the US improved by more than initially estimated in the month of April. The report showed the consumer sentiment index for April was upwardly revised to 88.3 from a preliminary reading of 86.5. MNI Indicators said its Chicago business barometer jumped to 72.1 in April from 66.3 in March, with a reading above 50 indicating growth. The US Commerce Department said personal income spiked by 21.1% in March after plunging by a revised 7% in February. China manufacturing sector continued to expand in April, with a manufacturing PMI score of 51.1, the National Bureau of Statistics said on Friday, down from 51.9 in March. It remains above the boom-or-bust line of 50 that separates expansion from contraction, however. The bureau also said that the non-manufacturing index came in with a score of 54.9, down from 56.3 in the previous month. The euro area economy yet again moved back into recession in the first quarter as restrictions imposed to contain the coronavirus pandemic dampened economic activity, the preliminary flash estimate published by Eurostat, showed on Friday. Gross domestic product contracted 0.6% from the fourth quarter, when GDP was down 0.7%. On a yearly basis, GDP fell 1.8% in the first quarter, but slower than the 4.9% decrease seen in the fourth quarter. Japan manufacturing sector continued to improve in April, with a manufacturing PMI score of 53.6, the latest survey from Jibun Bank revealed on Friday. That's up from 52.7 in March and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Japan industrial output rose a seasonally adjusted 2.2% on month in March, the Ministry of Economy, Trade and Industry said on Friday, following the 1.3% decline in February. On a yearly basis, industrial production advanced 4% following the 2% contraction in the previous month. Upon the release of the data, the METI upgraded its assessment of industrial production, saying that it is picking up.

Global Equities: The US stocks eased in last session with the DOW correcting by around half a percent. Profit selling pulled the indices lower after recent run to record highs.

Indian Economy: Goods and services tax (GST) collections hit a record monthly high of Rs 1.41 lakh crore in April. The combined Index of Eight Core Industries stood at 143.1 in March, 2021, which increased by 6.8% (provisional) as compared to the Index of March, 2020. However, its cumulative growth during April to March, 2020-21 has been (-) 7.0%. Final growth rate of Index of Eight Core Industries for December 2020 is revised to 0.4% from its provisional level (-) 1.3%. The Ministry of Finance, Government of India has decided to provide an additional amount of upto Rs 15,000 crore to States as interest free 50 year loan for spending on capital projects.

Equity Markets: Equity indices snapped four day rising streak and ended with deep losses on Friday. Barring the Nifty Pharma index, all other sectoral indices on the NSE traded in the red. The Nifty managed to close above the 14,600 mark.

Corporate News: Reliance Industries reported sharply higher profit at Rs 13,227 crore in Q4FY21 against Rs 6,348 crore in Q4FY20. The company's revenue rose to Rs 1,54,896 crore from Rs 1,39,535 crore YoY. IndusInd Bank reported profit at Rs 876 crore in Q4FY21 against Rs 301.8 crore in Q4FY20. Its net interest income rose to Rs 3,534.6 crore from Rs 3,231.2 crore YoY. Bajaj Electricals said it has bought the remaining stakes of Starlite Lighting Ltd for a cash consideration of around Rs 60 crore from its promoters. Tata Motors sold 41,739 vehicles in April, marking a drop of 40.6% from 70,263 vehicles sold in March 2021.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	194.7	(66.5)	(66.5)
MF(INR cr)	(87.7)	311.9	311.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	85,062	71,068	71,068
F&O(INR cr)	2,240,692	4,665,024	4,665,024

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.3	17.4	17.4
NSE VIX	23.0	21.8	21.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,782	(2.8) %	(3.2) %	Energy	18,031	(0.2) %	(2.6) %
IT	25,664	(0.8) %	(1.2) %	Pharma	13,469	1.3 %	8.8 %
Metals	4,848	(0.2) %	15.7 %	Finance	15,560	(3.0) %	(2.2) %
Auto	9,641	(1.4) %	(3.8) %	PSU	2,055	(1.0) %	(7.2) %
FMCG	33,623	(1.1) %	(3.6) %	Real Estate	310	(0.8) %	(7.8) %

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>
MRF	80,721	3.9 %	(2.9) %	H D F C	2,420	(4.7) %	(4.4) %
O N G C	108	3.9 %	3.6 %	HDFC Bank	1,412	(4.1) %	(5.0) %
Coal India	133	3.9 %	0.7 %	Biocon	380	(3.6) %	(7.5) %
Divi's Lab	4,062	3.9 %	12.3 %	Adani Gree	1,019	(3.5) %	(12.2) %
Grasim Ind	1,402	3.8 %	(3.6) %	ICICI Bank	601	(3.4) %	1.0 %

EVENTS CALENDAR

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

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