



04 Mar.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,088	(1.0) %	82.8 %
BSE SENSEX	51,445	2.3 %	80.2 %
CNX BANK	35,782	(1.6) %	96.5 %
CNX MIDCAP	24,467	(0.1) %	113.3 %
CNX SMALLCAP	8,442	0.5 %	138.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,270	(0.4) %	2.2 %
S&P 500	3,820	(1.3) %	1.7 %
FTSE 100	6,675	0.9 %	1.6 %
HANG SENG	29,880	2.7 %	8.8 %
NIKKEI	29,559	0.5 %	8.4 %
SHANGHAI COMPOSITE	3,577	2.0 %	2.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.32	(0.5) %	0.5 %
EUR/USD	1.20	(0.2) %	(1.8) %
GBP/USD	1.39	(0.0) %	2.0 %
USD/JPY	106.82	0.2 %	3.5 %
USD/AUD	1.28	(1.1) %	(1.0) %
USD/SGD	1.33	(0.2) %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	2.6 %	28.7 %
Gold(INR/10g)	44,970	(0.8) %	(11.8) %
Gold Comex(USD/oz)	1,715	(1.4) %	(12.0) %
SILVER(INR/1Kg)	67,593	0.5 %	(1.8) %
Aluminium(USD/MT)	2,203	1.2 %	9.4 %
Copper(USD/MT)	9,266	0.6 %	17.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.1 %	0.6 %

Global Economy: The US ISM said its services Purchasing Managers Index or PMI dropped to 55.3 in February from 58.7 in January, although a reading above 50 still indicates growth in the sector. Economists had expected the index to come in unchanged. A Federal Reserve report known as the Beige Book was released Wednesday and said economic activity expanded modestly from January to mid-February for most Fed districts. The Beige Book, a compilation of economic evidence from the twelve Fed districts, also said most businesses remain optimistic regarding the outlook for the next 6-12 months on COVID-19 vaccines. China services sector continued to expand with a PMI score of 51.5 in February, albeit at a slower pace, the latest survey from Caixin showed on Wednesday. That's down from 52.0 in January, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. Service providers indicated that business activity rose in line with new work. China's total new orders increased modestly overall, with the rate of growth likewise easing to a ten-month low. Euro area private sector continued to stay in contraction in February, as the final composite output index rose to 48.8 in February from 47.8 in January, final data from IHS Markit showed on Wednesday. The services PMI rose marginally to 45.7 from 45.4 in the previous month. The flash score was 44.7. UK service sector output declined only moderately in February after a sharp downturn at the start of 2021, as the third national lockdown has caused limited damage to the economy, results of a closely watched survey showed on Wednesday. The IHS Markit/Chartered Institute of Procurement & Supply final services Purchasing Managers' Index rose to 49.5 in February from an eight-month low of 39.5 in January.

Global Equities: The US stocks eased with tech heavy Nasdaq plunging around 2.7%. Rising bond yields weighed on the sentiments.

Indian Economy: India's services Purchasing Managers' Index rose to 55.3 in February from 52.8 in January, survey results from IHS Markit showed on Wednesday. New work intake increased for the fifth month in a row in February. New export orders declined for the twelfth straight month, albeit at the weakest rate since March last year. Employment decreased further in February. Backlogs of work was solid and quickened from January.

Equity Markets: Domestic shares rallied for the third straight session on Wednesday led by gains in banks, financials and metal stocks. The Nifty settled near 15,250 level. Barring the Nifty Auto index, all the sectoral indices ended in the green. Stocks rallied across the globe as easing US Treasury yields fuelled demand for riskier assets.

Corporate News: IT counters could be in focus as the Indian Rupee saw a massive spurt on continued support from overseas investors for local financial assets. INR edged up near 72.70 per US dollar in intraday moves as a rally from a two month low against the US dollar extended. IRCTC will operate trips through Golden Chariot from March 14. Bajaj Electricals and Mahindra Logistics signed an agreement for innovative logistics optimisation and outsourcing arrangement.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	361.2	238.5	156.8
MF(INR cr)	(1,220.4)	(1,205.2)	(558.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	85,245	79,096	62,606
F&O(INR cr)	4,373,127	3,531,997	2,428,550

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.7	24.7	28.1
NSE VIX	22.1	23.8	25.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	36,368	2.7 %	99.7 %	Energy	19,670	1.9 %	82.6 %
IT	25,773	1.9 %	114.0 %	Pharma	12,380	1.0 %	76.2 %
Metals	4,059	3.3 %	161.2 %	Finance	16,854	2.8 %	88.5 %
Auto	10,673	(0.7) %	129.2 %	PSU	2,455	3.2 %	91.3 %
FMCG	33,454	0.6 %	26.9 %	Real Estate	362	1.5 %	110.6 %

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>
HDFC AMC	3,189	8.7 %	45.9 %	Alkem Lab	2,842	(2.5) %	25.2 %
Punjab Nat	44	6.2 %	43.0 %	General In	198	(1.9) %	88.1 %
Adani Tran	828	6.0 %	337.2 %	Hero Motoc	3,424	(1.5) %	108.8 %
Tata Steel	777	5.7 %	191.8 %	Bosch	15,247	(1.3) %	65.1 %
Interglobe	1,783	5.4 %	78.4 %	Maruti Suz	7,125	(1.2) %	67.8 %

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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