



05 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,251	(0.5) %	(3.6) %
BSE SENSEX	38,409	(0.6) %	(1.2) %
CNX BANK	28,654	(1.8) %	(5.5) %
CNX MIDCAP	16,746	(1.5) %	(8.7) %
CNX SMALLCAP	5,577	(2.0) %	(17.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,091	4.5 %	(5.1) %
S&P 500	3,130	4.2 %	(3.1) %
FTSE 100	6,816	1.4 %	(10.4) %
HANG SENG	26,222	(0.2) %	(8.1) %
NIKKEI	21,100	0.1 %	(9.1) %
SHANGHAI COMPOSITE	3,012	0.6 %	(2.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.06	1.2 %	2.6 %
EUR/USD	1.11	1.1 %	(0.6) %
GBP/USD	1.28	(0.2) %	(3.0) %
USD/JPY	107.69	(0.4) %	(0.9) %
USD/AUD	1.52	(1.0) %	6.8 %
USD/SGD	1.39	(0.3) %	3.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	47	(0.8) %	(23.5) %
Gold(INR/10g)	43,146	2.0 %	10.6 %
Gold Comex(USD/oz)	1,646	(0.3) %	6.7 %
SILVER(INR/1Kg)	46,103	2.0 %	0.1 %
Aluminium(USD/MT)	1,724	1.0 %	(2.7) %
Copper(USD/MT)	5,695	0.5 %	(7.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.1	0.1 %	(0.9) %

Global Economy: The ISM said its US non-manufacturing index rose to 57.3 in February from 55.5 in January, with a reading above 50 indicating growth in service sector activity. With the uptick, the non-manufacturing index reached its highest level since hitting 58.5 in February of 2019. The Beige Book said most continue to expect modest economic growth in the near term but noted potential risks from the coronavirus outbreak and the upcoming presidential election. The Caixin China composite output index dropped sharply to 27.5 in February from 51.9 in the previous month. A score below 50 indicates contraction. The index signaled the sharpest decline in total Chinese business activity on record with this slide. The Caixin services Purchasing Managers' Index dipped to 26.5 in February from 51.8 in January. The euro area private sector growth reached a six-month high in February, despite the outbreak of coronavirus, final survey data from IHS Markit showed Wednesday. The composite output index rose to 51.6 in February from 51.3 in January. A score above 50 indicates expansion. At 52.6, the services Purchasing Managers' Index was up from 52.5 in January but below the flash 52.8. Australian Bureau of Statistics stated that the country's Gross domestic product climbed 0.5% in the fourth quarter of 2019 sequentially after expanding by revised 0.6% in the third quarter. On a yearly basis, GDP grew 2.2%. Japan's service sector contracted at the strongest rate since April 2014 as that the COVID-19 outbreak had squeezed tourism, survey data from IHS Markit showed Wednesday. The au Jibun Bank services Purchasing Managers' Index fell to 46.8 in February from 51.0 in January. A score below 50 indicates contraction.

Global Equities: US stocks saw a sharp jump as DOW added 4.5% amid supportive economic cues and bargain buying.

Indian Economy: India's service sector activity grew at nearly in seven year high in February, survey data from IHS Markit showed on Tuesday. The services Purchasing Managers' Index rose to 57.5 in February from 55.5 in January. A score above 50 suggests expansion. The PMI rose for the fifth successive month. New work intakes increased to the second-fastest level in over seven years in February. New orders from abroad led to the rise in total sales and the pace of expansion in international demand for Indian services decreased. The rate of job creation was the slowest in three months though, while employment increased in four out of the five tracked sub-sectors. Following sharp increase in both manufacturing and services output, the India composite output index surged to an eight-year high of 57.6 in February from 56.3 in January.

Equity Markets: The domestic stock market sharply came off day's low and ended with modest losses on Wednesday. The S&P BSE Sensex, fell 214.22 points or 0.55% at 38,409.48. It fell as much as 777.60 points, or 2.01% to hit the day's low of 37,846.10 in afternoon trade. The Nifty 50 index lost 49.10 points or 0.43% at 11,254.20. It fell as much as 221.15 points, or 1.96% at the day's low 11,082.15. Shares slumped in the afternoon after India's Health Minister Harsh Vardhan said that a total of 28 cases of coronavirus have been confirmed in India.

Corporate News: Reliance Industries (RIL) informed that Reliance Retail Ventures (RRVL), a subsidiary of RIL, has acquired 7,86,191 equity shares representing 100% of the equity share capital of Shri Kannan Departmental Store (SKDS) for a consideration of Rs 152.5 crore. Maruti Suzuki India said that with an objective to facilitate easy financing for customers, Maruti Suzuki India partnered with HDB Financial Service, a leading NonBanking Financial Company, to provide customized and attractive car loans for customers. The tie up will facilitate loans for both new and used cars.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(319.6)	(180.6)	39.1
MF(INR cr)	1,576.3	737.3	279.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	49,783	47,979	37,620
F&O(INR cr)	1,940,552	1,518,690	1,420,091

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	32.0	34.1	15.5
NSE VIX	24.2	24.7	16.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,654	(1.8) %	(5.5) %	Energy	13,877	0.1 %	(16.1) %
IT	15,864	0.9 %	0.1 %	Pharma	8,087	2.1 %	(13.7) %
Metals	2,304	(0.7) %	(25.7) %	Finance	13,440	(1.4) %	7.5 %
Auto	6,939	(0.7) %	(17.5) %	PSU	1,866	(0.8) %	(44.9) %
FMCG	29,224	(0.6) %	(3.2) %	Real Estate	281	(1.1) %	5.2 %

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>
Cipla	448	5.3 %	(14.8) %	Shriram Tr	1,165	(7.3) %	(5.7) %
Dr Reddy's	3,171	4.2 %	13.5 %	Yes Bank	29	(6.1) %	(89.4) %
Sun Pharma	405	3.0 %	(15.3) %	Motherson	101	(5.3) %	(34.5) %
Pidilite I	1,582	2.8 %	26.3 %	Ashok Leyl	72	(4.0) %	(19.8) %
Power Grid	197	2.8 %	0.8 %	P & G Hygi	10,423	(4.0) %	(3.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Trade Balance (JAN)	05-03-2020	6:00	AUD	-	-
Bank of Canada's Poloz Gives Economic Progress Report	05-03-2020	23:15	CAD	-	-
Markit Germany Construction PMI (FEB)	05-03-2020	14:00	EUR	-	54.9
New Car Registrations (YoY) (FEB)	05-03-2020	14:30	GBP	-	(0.073)
BOE Chief Economist Andy Haldane speaks in Paris	05-03-2020	18:30	GBP	-	-
BOE's Carney Speaks in London.	05-03-2020	22:30	GBP	-	-
Foreign Buying Japan Bonds (FEB 28)	05-03-2020	5:20	JPY	-	-
U.S. Federal Reserve Releases Beige Book	05-03-2020	0:30	USD	-	-
Challenger Job Cuts (YoY) (FEB)	05-03-2020	18:00	USD	-	0.278
Continuing Claims (FEB 22)	05-03-2020	19:00	USD	-	-
Durable Goods Orders (JAN F)	05-03-2020	20:30	USD	-	(0.002)
EIA Natural Gas Storage Change (FEB 28)	05-03-2020	21:00	USD	-	(143)
U.S. to Sell 4-Week Bills	05-03-2020	22:00	USD	-	-
Bullard Makes Opening Remarks	05-03-2020	5:00	USD	-	-

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