



05 Mar.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,081	(1.1) %	82.7 %
BSE SENSEX	50,846	(1.2) %	79.9 %
CNX BANK	35,803	(1.6) %	96.6 %
CNX MIDCAP	24,608	0.5 %	114.5 %
CNX SMALLCAP	8,499	1.2 %	140.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,924	(1.1) %	1.0 %
S&P 500	3,768	(1.3) %	0.3 %
FTSE 100	6,651	(0.4) %	1.2 %
HANG SENG	29,237	(2.2) %	6.4 %
NIKKEI	28,930	(2.1) %	6.1 %
SHANGHAI COMPOSITE	3,503	(2.1) %	0.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.32	(0.2) %	0.5 %
EUR/USD	1.20	(0.1) %	(1.8) %
GBP/USD	1.39	(0.2) %	2.0 %
USD/JPY	106.82	0.1 %	3.5 %
USD/AUD	1.28	(0.4) %	(1.0) %
USD/SGD	1.33	0.1 %	0.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	2.6 %	28.7 %
Gold(INR/10g)	44,660	(0.7) %	(12.5) %
Gold Comex(USD/oz)	1,715	(1.4) %	(12.0) %
SILVER(INR/1Kg)	65,940	(2.4) %	(4.2) %
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 Federal Reserve Chairman Jerome Powell stated that the reopening of the US economy could lead to higher inflation but reiterated the central bank will remain patient with regard to monetary policy. The Fed chief said he expects the increase in inflation to be transitory. Powell did not comment on any changes in Fed's asset purchases in response to the recent surge in bond yields. The US Labor Department said labor productivity tumbled by 4.2% in the fourth quarter compared to the previously reported 4.8% slide. Eurozone retail sales tumbled in January, data from Eurostat showed on Thursday. The retail sales volume fell 5.9% on month, in contrast to a 1.8% rise in December. Sales of food, drinks and tobacco gained 1.1%, while non-food product sales were down 12%. Year-on-year, retail sales plummeted 6.4%, following December's 0.9% rise. Germany's construction activity contracted sharply in February on bad weather, survey results from IHS Markit showed. The construction Purchasing Managers' Index fell to 41.0 from 46.6 in January. UK car sales tumbled in February as the lockdown depressed demand, data from the Society of Motor Manufacturers and Traders, or SMMT, showed on Thursday. UK Car registrations fell 35.5% on a yearly basis in February. Australia posted a seasonally adjusted merchandise trade surplus of A\$10.412 billion in January, the Australian Bureau of Statistics said on Thursday, following the upwardly revised A\$7.133 billion surplus in December. Exports were up 6% on month or A\$2.316 billion to A\$39.849 billion after gaining 3.0 percent in the previous month. Imports were down 2% on month or A\$694 million to A\$29.707 billion after slipping 2% in December.

**Global Equities:** The US equities slumped as risk sentiments were battered following another jump in treasury yields.

**Indian Equities:** India has attracted total Foreign Direct Investment (FDI) inflow of US\$ 67.54 billion during April to December 2020. It is the highest ever for the first ninth months of a financial year and 22% higher as compared to the first ninth months of 2019-20 (US\$ 55.14 billion). FDI equity inflow grew by 40% in the first 9 months of F.Y. 2020-21 (US\$ 51.47 billion) compared to the year ago period (US\$ 36.77 billion). FDI inflow increased by 37% in 3rd Quarter of 2020-21 (US\$ 26.16 billion) compared to 3rd quarter of 2019-20 (US\$ 19.09 billion). FDI inflow showed positive growth of 24% in the month of December, 2020 (US\$ 9.22 billion) compared to December, 2019 (US\$ 7.46 billion).

**Equity Markets:** Key equity indices snapped three day winning run and ended with modest losses on Thursday. A rise in US bond yields spoilt investor sentiment globally. The Nifty closed below the crucial 15,100 mark. Barring media and realty index, all sectoral indices on the NSE ended in the red.

**Corporate News:** Wipro has signed an agreement to acquire Capco, a global management and technology consultancy providing digital, consulting and technology services to financial institutions in America, Europe and the Asia Pacific. Unichem Labs has received ANDA approval for its Guanfacine tablets, from USFDA to market a generic version of TENEX (Guanfacine) tablets of Promius Pharma LLC.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	333.0	270.0	157.6
MF(INR cr)	(259.6)	116.8	(541.1)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	87,769	81,264	62,715
F&O(INR cr)	9,547,789	5,035,945	2,459,236

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.7	24.7	28.1
NSE VIX	24.2	0	0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,803	(1.6) %	96.6 %	Energy	19,507	(0.8) %	81.1 %
IT	25,632	(0.5) %	112.8 %	Pharma	12,352	(0.2) %	75.8 %
Metals	3,977	(2.0) %	156.0 %	Finance	16,551	(1.8) %	85.1 %
Auto	10,626	(0.4) %	128.1 %	PSU	2,437	(0.7) %	89.9 %
FMCG	33,444	(0.0) %	26.9 %	Real Estate	363	0.1 %	110.8 %

### 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>
Container	616	6.4 %	93.9 %	JSW Steel	414	(3.3) %	189.6 %
UltraTech	6,776	4.2 %	115.7 %	Hindalco I	349	(2.8) %	281.3 %
Shree Ceme	28,677	3.5 %	73.3 %	H D F C	2,583	(2.7) %	63.1 %
Ambuja Cem	292	3.5 %	86.4 %	Tata Motor	339	(2.7) %	399.2 %
ACC	1,854	3.2 %	92.4 %	Bajaj Fins	10,130	(2.6) %	125.0 %

### EVENTS CALENDAR

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

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