



05 Apr.2021

### INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,867	1.2 %	0.0 %
BSE SENSEX	50,030	1.1 %	0.0 %
CNX BANK	33,858	1.7 %	0.0 %
CNX MIDCAP	24,118	1.8 %	0.0 %
CNX SMALLCAP	8,283	2.1 %	0.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,153	0.5 %	8.3 %
S&P 500	4,020	1.2 %	7.0 %
FTSE 100	6,737	0.4 %	2.5 %
HANG SENG	28,939	2.0 %	5.3 %
NIKKEI	29,389	0.7 %	7.8 %
SHANGHAI COMPOSITE	3,466	0.7 %	(1.0) %

### FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.23	(0.0) %	0.4 %
EUR/USD	1.17	(0.1) %	(4.4) %
GBP/USD	1.38	0.1 %	0.9 %
USD/JPY	110.71	0.5 %	7.3 %
USD/AUD	1.31	0.2 %	1.3 %
USD/SGD	1.35	(0.2) %	1.8 %

### COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	3.9 %	29.0 %
Gold(INR/10g)	44,741	1.4 %	(12.3) %
Gold Comex(USD/oz)	1,732	1.1 %	(11.1) %
SILVER(INR/1Kg)	63,713	1.1 %	(7.5) %
Aluminium(USD/MT)	2,213	0.0 %	9.9 %
Copper(USD/MT)	8,768	(0.9) %	10.7 %

### FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	(0.0) %	0.8 %

**Indian Equities:** The domestic equity indices ended near the day's high on Thursday led by gains in banks and auto stocks. As per the provisional closing data, the barometer index, the S&P BSE Sensex, jumped 520.68 points or 1.05% at 50,029.55. The Nifty 50 index advanced 176.65 points or 1.2% at 14,867.05.

#### Corporate News:

- Steel Authority of India Limited (SAIL) said that it has recorded its best ever quarterly performance in both production and sales during Q4 FY'21. The company clocked its best ever annual sales at 14.87 MT, a growth of 4.4% over 14.23 MT during FY'20.
- Wipro has completed the aforesaid take over of METRO-NOM GMBH and METRO Systems Romania S.R.L. for a purchase consideration of EUR 52.04 Mn based on the financials at the time of completion of the transaction.
- A spurt in global WTI crude oil prices, which jumped more than 3.5% in last session can weigh on local oil and gas counters.

**Indian Economy:** India's merchandise exports in March 2021 were USD 34.0 billion as compared to USD 21.49 billion in March 2020, marking an increase of 58.23%. Exports during April-March 2020-21 were USD 290.18 billion, as compared to USD 313.36 billion during the same period of last year, exhibiting a negative growth of 7.40%. India's merchandise imports in March 2021 were USD 48.12 billion as compared to USD 31.47 billion in March 2020, an increase of 52.89%. Merchandise imports during April-March 2020-21 were USD 388.92 billion, as compared to USD 474.71 billion during the same period of last year, exhibiting a negative growth of 18.07%. India is thus a net importer in March 2021, with a trade deficit of USD 14.11 billion, as compared to trade deficit of USD 9.98 billion, improvement by 41.4%.

**Global Economy:** The US Labor Department said non-farm payroll employment surged up by 916,000 jobs in March after climbing by an upwardly revised 468,000 jobs in February. The increase in employment reflected widespread job growth, with employment in the leisure and hospitality sector once again leading the way. The impressive job growth resulted in a continued decrease by the unemployment rate, which fell to 6.0 percent in March from 6.2 percent in February. China's manufacturing sector growth moderated in March suggesting that the post-epidemic recovery was continuing to falter, survey results from IHS Markit showed on Thursday. The Caixin factory Purchasing Managers' Index fell to 50.6 in March from 50.9 in the previous month. This was the lowest reading since April 2020. The euro area manufacturing sector grew at the strongest pace in nearly 24 years of data collection, underpinned by strong production and orders, final data from IHS Markit showed on Thursday. The final factory Purchasing Managers' Index rose to 62.5 in March from 57.9 in February. The UK manufacturing sector logged the fastest growth in a decade in March driven by strong inflows of business from domestic and overseas markets, survey data from IHS Markit and Chartered Institute of Procurement & Supply showed Thursday. The factory Purchasing Managers' Index rose to a decade-high of 58.9 in March, its best outcome since February 2011.

**Global Equities:** A strong undertone in the US labour market clubbed with firm manufacturing cues from across the globe are keeping sentiments mostly positive for risky assets.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	54.6	138.3	154.7
MF(INR cr)	127.6	117.9	(490.8)

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	62,407	62,407	62,407
F&O(INR cr)	7,341,038	7,341,038	7,341,038

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.4	19.4	19.4
NSE VIX	20.0	20.0	20.0

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,858	1.7 %	0.0 %	Energy	18,516	1.8 %	0.0 %
IT	25,980	0.5 %	0.0 %	Pharma	12,377	0.9 %	0.0 %
Metals	4,189	5.3 %	0.0 %	Finance	15,909	1.2 %	0.0 %
Auto	10,023	1.6 %	0.0 %	PSU	2,215	2.6 %	0.0 %
FMCG	34,875	(0.2) %	0.0 %	Real Estate	336	0.5 %	0.0 %

## 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>
Adani Tran	999	10.0 %	0.0 %	Hind. Unil	2,399	(1.3) %	0.0 %
JSW Steel	509	8.6 %	0.0 %	Marico	407	(1.0) %	0.0 %
Adani Ente	1,107	7.4 %	0.0 %	Interglobe	1,617	(0.9) %	0.0 %
Hindalco I	350	7.2 %	0.0 %	P & G Hygi	12,568	(0.9) %	0.0 %
Tata Steel	863	6.3 %	0.0 %	HDFC Life	691	(0.7) %	0.0 %

## 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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