



06 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,269	0.2 %	(3.4) %
BSE SENSEX	38,471	0.2 %	(1.0) %
CNX BANK	28,815	0.6 %	(5.0) %
CNX MIDCAP	16,770	0.1 %	(8.5) %
CNX SMALLCAP	5,583	0.1 %	(17.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,121	(3.6) %	(8.5) %
S&P 500	3,024	(3.4) %	(6.4) %
FTSE 100	6,705	(1.6) %	(11.8) %
HANG SENG	26,768	2.1 %	(6.2) %
NIKKEI	21,329	1.1 %	(8.1) %
SHANGHAI COMPOSITE	3,072	2.0 %	(0.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.51	1.4 %	3.2 %
EUR/USD	1.11	0.4 %	(0.6) %
GBP/USD	1.28	0.3 %	(2.7) %
USD/JPY	107.45	(0.5) %	(1.1) %
USD/AUD	1.51	(1.2) %	6.1 %
USD/SGD	1.39	(0.3) %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	46	(1.9) %	(25.0) %
Gold(INR/10g)	43,294	0.3 %	11.0 %
Gold Comex(USD/oz)	1,677	1.9 %	8.7 %
SILVER(INR/1Kg)	46,114	0.0 %	0.1 %
Aluminium(USD/MT)	1,715	(0.5) %	(3.2) %
Copper(USD/MT)	5,668	(0.5) %	(8.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.9	(0.1) %	(1.0) %

Global Economy: New orders for US manufactured goods pulled back, according to a report released by the Commerce Department on Thursday. The Commerce Department said factory orders slid by 0.5% in January after surging up by 1.9% in December. The US initial jobless claims edged down to 216,000, marking a decrease of 3,000 from the previous week's unrevised level of 219,000. UK new car sales fell in February as demand from private buyers weakened again, data from the Society of Motor Manufacturers and Traders, or SMMT, showed Thursday. Car registrations declined 2.9% on a yearly basis to 79,594 units in February. The demand for both diesel and petrol cars decreased in February, with registrations down 27.1% and 7.3%, respectively.

Global Equities: US markets tanked on fresh worries over coronavirus. DOW gave up some of the hefty gains recorded on Wednesday and plummeted 3.6%. European markets also saw heavy losses.

Indian Economy: The Employees' Provident Fund Organisation announced a 15 basis point reduction in the interest rate on PF deposits in 2019-20 compared to 8.65% in 2018-19 on the back of lower yields on its investments. Ministry of Health and Family Welfare reported that as of now, 29 confirmed cases of COVID-19 have been detected in the country. Of these, three (from Kerala) have recovered and have been discharged. Universal screening has been mandated since 4th March 2020 (yesterday) and has started in most airports from yesterday evening. The Solvent Extractors' Association (SEA) forecasts a bumper rapeseed crop in the current year (2019-20) at 77.80 lakh tons. In the previous year, SEA had projected the production at 75.00 lakh tons of rape mustard in India.

Equity Markets: The local stock market ended almost flat on Thursday after rising sharply in afternoon trade as concerns over coronavirus outbreak continued to haunt investors. The barometer index, the S&P BSE Sensex rose 61.13 points or 0.16% at 38,470.61. The Nifty 50 index advanced 18 points or 0.16% at 11,269. Trading was volatile due to expiry of weekly index options on the NSE.

Corporate News: SBI said that the matter regarding buying stake in Yes Bank was discussed at the meeting of the central board of the bank on 5 March 2020 and an in-principle approval has been given by the board to explore investment opportunity in the bank. Yes Bank was placed under a "moratorium" late yesterday (5 March 2020), with the Reserve Bank of India (RBI) capping depositor withdrawals at Rs 50,000 per account for a month and superseding the board with immediate effect. RBI assured the depositors of the bank that their interest will be fully protected and there is no need to panic. Mahindra & Mahindra said its production fell 55.96% to 25,643 units in February 2020 from 58,231 units in February 2019. Sales declined 43.02% to 30,083 units in February 2020 from 52,799 units in February 2019.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(107.3)	(156.2)	38.5
MF(INR cr)	267.5	580.7	278.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	46,910	47,711	37,660
F&O(INR cr)	3,712,514	2,067,146	1,430,058

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	39.6	35.5	15.6
NSE VIX	23.3	24.3	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	28,815	0.6 %	(5.0) %	Energy	13,744	(1.0) %	(16.9) %
IT	15,871	0.0 %	0.2 %	Pharma	8,146	0.7 %	(13.1) %
Metals	2,285	(0.8) %	(26.3) %	Finance	13,473	0.2 %	7.8 %
Auto	6,954	0.2 %	(17.4) %	PSU	1,892	1.4 %	(44.1) %
FMCG	29,531	1.0 %	(2.2) %	Real Estate	278	(1.1) %	4.0 %

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>
Yes Bank	37	25.6 %	(86.7) %	Zee Entert	238	(5.4) %	(44.8) %
Bandhan Ba	423	5.7 %	(20.2) %	Hindalco I	156	(3.2) %	(28.0) %
ICICI Lomb	1,263	4.0 %	24.4 %	Bharti Inf	215	(2.9) %	(31.7) %
Cadila Hea	264	3.2 %	(23.3) %	ICICI Pru	433	(2.8) %	19.3 %
Pidilite I	1,630	3.0 %	30.1 %	Container	466	(2.7) %	(12.2) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Foreign Reserves (Australian dollar) (FEB)	06-03-2020	11:00	AUD	-	-
AiG Performance of Service Index (FEB)	06-03-2020	3:00	AUD	-	47.4
Retail Sales (MoM) (JAN)	06-03-2020	6:00	AUD	-	(0.005)
Net Change in Employment (FEB)	06-03-2020	19:00	CAD	-	-
Ivey Purchasing Managers Index s.a. (FEB)	06-03-2020	20:30	CAD	-	57.3
Foreign Currency Reserves (FEB)	06-03-2020	13:30	CHF	-	-
German Factory Orders n.s.a. (YoY) (JAN)	06-03-2020	12:30	EUR	-	(0.087)
Coincident Index (JAN P)	06-03-2020	10:30	JPY	-	94.1
Labor Cash Earnings (YoY) (JAN)	06-03-2020	5:00	JPY	-	0
BOJ Outright Bond Purchase 5~10 Years	06-03-2020	6:40	JPY	-	-
Volume of All Buildings SA (QoQ) (4Q)	06-03-2020	3:15	NZD	-	0.004
Fed's Evans and Mester Speaks at Shadow Open Market Committee	06-03-2020	19:50	USD	-	-
Fed's Bullard Speaks at Shadow Committee Event in New York	06-03-2020	21:50	USD	-	-
Baker Hughes U.S. Rig Count (MAR 6)	06-03-2020	23:30	USD	-	790
Fed's Kashkari Speaks at University of Minnesota	06-03-2020	6:30	USD	-	-
Fed's Williams Speaks at Foreign Policy Association Dinner	06-03-2020	7:15	USD	-	-

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