



06 Apr.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,638	(1.5) %	(1.5) %
BSE SENSEX	49,159	(1.7) %	(1.7) %
CNX BANK	32,679	(3.5) %	(3.5) %
CNX MIDCAP	23,799	(1.3) %	(1.3) %
CNX SMALLCAP	8,162	(1.5) %	(1.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,527	1.1 %	9.5 %
S&P 500	4,078	1.4 %	8.6 %
FTSE 100	6,737	0.4 %	2.5 %
HANG SENG	28,939	2.0 %	5.3 %
NIKKEI	30,089	0.8 %	10.4 %
SHANGHAI COMPOSITE	3,484	0.5 %	(0.5) %

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)	45,058	0.7 %	(11.7) %
Gold Comex(USD/oz)	1,732	1.1 %	(11.1) %
SILVER(INR/1Kg)	65,215	2.4 %	(5.3) %
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 %

Global Economy: Growth in US service sector activity saw a substantial acceleration in the month of March, according to a report released by the Institute for Supply Management (ISM) on Monday. The ISM said its Services PMI surged up to 63.7 in March from 55.3 in February, with a reading above 50 indicating growth. The US Commerce Department said factory orders slid by 0.8% in February after spiking by an upwardly revised 2.7 percent in January. The durable goods orders tumbled by 1.2%, led by a 1.8 percent slump in orders for transportation equipment. Non-durable goods orders also fell by 0.4%. Japan's services activity contracted at a slower than initial estimates in March, final data from IHS Markit showed on Monday. The au Jibun Bank Japan Services Purchasing Managers' Index rose to 48.3 in March from 46.3 in February. This was above the flash score of 46.5 but below the neutral 50.0 mark, suggesting contraction in the sector. The latest reading was still the highest since January 2020. New business inflows fell at a softer pace in the latest survey period. Japanese service providers increased employment levels for the second successive month while average cost burdens climbed for the fourth straight month in March. Russia's service sector grew at the fastest pace in seven months in March, data from IHS Markit showed on Monday. The services Purchasing Managers' Index advanced to 55.8 in March from 52.2 in February. The rise in business activity was largely linked to stronger client demand amid looser Covid-19 restrictions. Foreign demand rose for the first time in over a year and at the sharpest since October 2019. Russia's composite output index for private sector came in at 54.6 in March, up from 52.6 in February, marking the steepest rise in business activity since August 2020. Foreign net flows to emerging market equity and debt portfolios slowed in March to their weakest in almost a year, with flows excluding China barely making a blip last month, data from the Institute of International Finance showed on Monday.

Global Equities: The US stocks extended their solid run on upbeat labour market cues. The Dow and the S&P 500 have reached new record intraday highs.

Indian Economy: India's manufacturing sector grew at its weakest pace in seven months in March on renewed lockdowns to curtail a resurgence in COVID-19 cases. The Nikkei Manufacturing Purchasing Managers' Index or PMI, compiled by IHS Markit, dropped to a seven-month low of 55.4 last month from February's 57.5, but remained above the 50-level separating growth from contraction for an eighth straight month. The foreign orders grew at a faster pace in March, but a sub-index tracking overall demand declined to its lowest since August 2020. Output also grew at its weakest pace in seven months.

Equity Markets: The domestic equity benchmarks ended with significant cuts on Monday, led by weakness in banks and financial shares. IT and metal stocks bucked the broader selloff. A spike in domestic coronavirus cases and fresh curbs imposed by the state government dented investors' sentiment.

Corporate News: Top carmaker Maruti Suzuki India on Monday said its total production in March 2021 increased significantly to 1,72,433 units over the same month last year. The company had produced a total of 92,540 units in the year-ago period, Maruti Suzuki India (MSI) said in a regulatory filing. Jindal Steel and Power said its sales hit a new record of 7,86,000 tonnes in March 2021, up 61% YoY. Panacea Biotec said that the company and Russian Direct Investment Fund has agreed for cooperation to produce 100 million doses per year of Sputnik V.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(230.4)	111.1	152.3
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	21.2	20.6	20.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,679	(3.5) %	(3.5) %	Energy	18,232	(1.5) %	(1.5) %
IT	26,491	2.0 %	2.0 %	Pharma	12,332	(0.4) %	(0.4) %
Metals	4,226	0.9 %	0.9 %	Finance	15,392	(3.3) %	(3.3) %
Auto	9,768	(2.5) %	(2.5) %	PSU	2,124	(4.1) %	(4.1) %
FMCG	34,305	(1.6) %	(1.6) %	Real Estate	324	(3.4) %	(3.4) %

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	1,095	9.6 %	9.6 %	United Bre	1,150	(7.4) %	(7.4) %
Info Edg.(4,433	4.0 %	4.0 %	Bajaj Fina	4,963	(5.9) %	(5.9) %
L & T Info	4,270	3.8 %	3.8 %	IndusInd B	937	(5.6) %	(5.6) %
HCL Techno	1,034	3.1 %	3.1 %	DLF	277	(5.2) %	(5.2) %
Adani Ente	1,138	2.8 %	2.8 %	St Bk of I	354	(4.6) %	(4.6) %

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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