



07 Apr.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,684	0.3 %	(1.2) %
BSE SENSEX	49,201	0.1 %	(1.7) %
CNX BANK	32,501	(0.5) %	(4.0) %
CNX MIDCAP	24,016	0.9 %	(0.4) %
CNX SMALLCAP	8,273	1.4 %	(0.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,430	(0.3) %	9.2 %
S&P 500	4,074	(0.1) %	8.5 %
FTSE 100	6,824	1.3 %	3.8 %
HANG SENG	28,939	2.0 %	5.3 %
NIKKEI	29,697	(1.3) %	8.9 %
SHANGHAI COMPOSITE	3,483	(0.0) %	(0.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.29	0.1 %	0.5 %
EUR/USD	1.18	0.2 %	(4.1) %
GBP/USD	1.38	0.5 %	1.3 %
USD/JPY	110.72	0.0 %	7.3 %
USD/AUD	1.32	0.1 %	1.4 %
USD/SGD	1.35	0.1 %	1.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(4.6) %	23.2 %
Gold(INR/10g)	45,191	0.3 %	(11.4) %
Gold Comex(USD/oz)	1,736	0.3 %	(10.9) %
SILVER(INR/1Kg)	65,366	0.2 %	(5.1) %
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: International Monetary Fund (IMF) raised its global growth projections for this year and next, citing huge fiscal stimulus in some big economies and a vaccine-driven recovery in the future. The world economy is set to grow 6% this year and 4.4% next year, the global lender said in its latest World Economic Outlook report, released Tuesday. China services sector continued to expand with a PMI score of 54.3 in March, the latest survey from Caixin showed on Tuesday. That's up from 51.5 in February, and it moves further above the boom-or-but line of 50 that separates expansion from contraction. Individually, business activity and sales both rose at quicker rates, while employment returned to growth. Business confidence hit its highest mark in more than a decade amid hopes for a post-pandemic recovery. Also, the composite index climbed from 51.7 in February at 53.1 in March. Eurozone investor confidence hit its strongest level in more than two years in April as lockdowns in many euro area countries had little effect on the overall economic recovery, survey data from Sentix showed on Tuesday. The investor confidence index rose sharply to 13.1 in April from 5.0 in March. The expectations index rose to an all-time high of 34.8 from 32.5 in the previous month. The UK car market recorded its first yearly growth since August 2020, the Society of Motor Manufacturers and Traders, or SMMT, said Tuesday. Registrations increased 11.5% year-on-year in March. The month represents the anniversary of the first lockdown in March 2020, when registrations plunged 44.4%. Data showed that so far, 2021 has seen 58,032 fewer cars registered compared to January to March period last year. Australia's central bank kept its current policy settings unchanged on Tuesday. The policy board of the Reserve Bank of Australia headed by Governor Philip Lowe decided to retain its cash rate at a record low of 0.10%. The central bank also retained the target yield on the 3-year Australian government bond at around 0.1% and also maintained the parameters of the Term Funding Facility and the government bond purchase programme.

Global Equities: The global equities mostly stayed supported amid robust global economic outlook. Sentiments also remained upbeat ahead of the March quarter corporate earnings.

Indian Economy: Financial Year (FY) 2020-21 witnessed strong Foreign Portfolio Investment (FPI) inflows into the Indian equity markets of Rs 2,74,034 crore. The robust FPI flows came on the back of faster than expected economic recovery supported by multiple tranches of innovatively designed stimulus packages. The Government and regulators had also undertaken major policy initiatives directed at improving ease of access and investment climate for FPIs in the recent past.

Equity Markets: The key equity indices ended almost flat with some positive bias after a volatile trade on Tuesday. Pharma stocks were in demand. The Nifty closed just shy of the 14,700 mark. Gains were capped amid a spike in Covid-19 cases in the country.

Corporate News: Leading counters in infrastructure and consumption linked sectors will be in demand as the International Monetary Fund (IMF) on Tuesday upgraded its gross domestic product (GDP) projection for India to 12.5% in FY22, the highest growth rate estimated for any country this fiscal. The estimate is 1% higher than its earlier forecast made in January. Banking stocks will be in focus ahead of the monetary policy announcement from the Reserve Bank Of India (RBI). RIL said Reliance Jio Infocomm has entered into a definitive agreement with Bharti Airtel for the acquisition of the right to use spectrum in the 800MHz band in Andhra Pradesh, Delhi and Mumbai circles through spectrum trading. Tata Steel India achieved the highest ever quarterly crude steel production of 4.75 million tonnes with a 3% QoQ growth in Q4FY21.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(89.9)	(89.9)	(89.9)
MF(INR cr)	(263.5)	(187.3)	(187.3)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	3,821	33,114	33,114
F&O(INR cr)	3,485,661	4,598,283	4,598,283

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.3	18.4	18.4
NSE VIX	20.8	20.7	20.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,501	(0.5) %	(4.0) %	Energy	18,217	(0.1) %	(1.6) %
IT	26,532	0.2 %	2.1 %	Pharma	12,549	1.8 %	1.4 %
Metals	4,287	1.4 %	2.3 %	Finance	15,395	0.0 %	(3.2) %
Auto	9,781	0.1 %	(2.4) %	PSU	2,123	(0.0) %	(4.1) %
FMCG	34,620	0.9 %	(0.7) %	Real Estate	328	1.2 %	(2.2) %

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>
Adani Port	836	12.6 %	13.5 %	United Bre	1,110	(3.5) %	(10.6) %
Adani Ente	1,225	7.7 %	10.7 %	Power Grid	209	(2.3) %	(4.3) %
Tata Consu	675	4.6 %	3.8 %	Siemens	1,786	(2.1) %	(3.9) %
Pidilite I	1,874	4.2 %	2.8 %	Jubilant F	2,797	(1.4) %	(5.2) %
Asian Pain	2,612	4.0 %	2.3 %	NMDC	139	(1.3) %	0.5 %

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					

..... End of Report