



08 Apr.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,819	0.9 %	(0.3) %
BSE SENSEX	49,662	0.9 %	(0.7) %
CNX BANK	32,991	1.5 %	(2.6) %
CNX MIDCAP	24,333	1.3 %	0.9 %
CNX SMALLCAP	8,414	1.7 %	1.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,446	0.1 %	9.3 %
S&P 500	4,080	0.2 %	8.6 %
FTSE 100	6,885	0.9 %	4.8 %
HANG SENG	28,675	(0.9) %	4.4 %
NIKKEI	29,731	0.1 %	9.1 %
SHANGHAI COMPOSITE	3,480	(0.1) %	(0.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.25	(0.1) %	0.4 %
EUR/USD	1.18	0.2 %	(3.9) %
GBP/USD	1.39	0.3 %	1.6 %
USD/JPY	110.41	(0.3) %	7.0 %
USD/AUD	1.31	(0.4) %	1.0 %
USD/SGD	1.34	(0.2) %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	1.2 %	24.6 %
Gold(INR/10g)	45,829	1.4 %	(10.2) %
Gold Comex(USD/oz)	1,745	0.5 %	(10.5) %
SILVER(INR/1Kg)	66,017	1.0 %	(4.1) %
Aluminium(USD/MT)	2,247	1.6 %	11.6 %
Copper(USD/MT)	8,985	2.5 %	13.5 %

FIXED INCOME

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

Global Economy: The minutes of the last US Federal Reserve meeting stated that participants noted that the COVID-19 pandemic was causing tremendous human and economic hardship across the United States and around the world. Following a moderation in the pace of the recovery, indicators of economic activity and employment had turned up recently, although the sectors most adversely affected by the pandemic remained weak. Inflation continued to run below 2%. Overall financial conditions remained accommodative, in part reflecting policy measures to support the economy and the flow of credit to US households and businesses. The US Commerce Department said the trade deficit widened to \$71.1 billion in February from a revised \$67.8 billion in January. Eurozone private sector returned to growth in March underpinned by a record increase in manufacturing output, final survey data from IHS Markit showed on Wednesday. The final composite output index rose to 53.2 in March from 48.8 in February. The score was also above the flash estimate of 52.5. The second-fastest increase in private sector output in two-and-a-half years was driven by a surge in manufacturing production, the strongest in nearly 24 years of data collection. Meanwhile, services output fell again but at the slowest rate in the current seven-month sequence of contraction. The final services Purchasing Managers' Index came in at 49.6, up from 45.7 a month ago. The flash reading was 48.8. Japan's leading index hit the highest level in nearly three years in February, preliminary data from the Cabinet Office showed on Wednesday. The leading index, which measures the future economic activity, grew to 99.7 in February from 98.5 in January. The coincident index decreased to 89.0 in February from 90.3 in the previous month. The lagging index also rose to 91.6 in February from 91.4 in the prior month. This was the highest reading since July last year. Australia construction sector continued to expand in March, with a seasonally adjusted Performance of Construction Index score of 61.8, the latest survey from the Australian Industry Group showed on Wednesday. That's up from 57.4 in February and it moves further above the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: Stocks saw a mixed outing amid thin buying after recent surge.

Indian Economy: The Reserve Bank of India MPC voted unanimously to leave the policy repo rate unchanged at 4%. The Monetary Policy Committee (MPC) met on 5th, 6th and 7th April, 2021 and deliberated on current and evolving macroeconomic and financial developments, both domestic and global. It also unanimously decided to continue with the accommodative stance as long as necessary to sustain growth on a durable basis and continue to mitigate the impact of COVID-19 on the economy, while ensuring that inflation remains within the target going forward. The marginal standing facility (MSF) rate and the bank rate remain unchanged at 4.25%. The reverse repo rate stands unchanged at 3.35%.

Equity Markets: The domestic equity benchmarks ended with strong gains on Wednesday. The Nifty ended above the 14,800 mark. Bank stocks advanced after the RBI maintained status quo on interest rates while announcing its latest monetary policy outcome.

Corporate News: IT counters could stay supported as the Rupee slumped following these comments and broke beyond 74 per US dollar mark. The INR tested a five-month low of 74.50 per US dollar and ended down around 1 Rupee at 74.47 per US dollar. Muthoot Finance Ltd has announced its 25th series of Public Issue of Secured Redeemable NonConvertible Debentures of face value of Rs. 1,000 each. Prakash Industries recorded highest ever sales volume in FY21. The Company achieved highest ever sales of around 9,54,760 tonnes of steel, a growth of 3.13% over FY2019-20 despite disruptions due to COVID-19 pandemic.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(119.1)	(104.5)	(104.5)
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)	76,611	47,613	47,613
F&O(INR cr)	4,386,299	4,545,287	4,545,287

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.9	18.2	18.2
NSE VIX	20.3	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	32,991	1.5 %	(2.6) %	Energy	18,333	0.6 %	(1.0) %
IT	26,831	1.1 %	3.3 %	Pharma	12,616	0.5 %	1.9 %
Metals	4,325	0.9 %	3.3 %	Finance	15,578	1.2 %	(2.1) %
Auto	9,937	1.6 %	(0.9) %	PSU	2,165	2.0 %	(2.3) %
FMCG	34,835	0.6 %	(0.1) %	Real Estate	331	1.0 %	(1.3) %

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>
JSW Steel	562	4.6 %	10.5 %	Adani Tran	1,055	(5.0) %	5.6 %
Info Edg.(4,691	4.3 %	10.0 %	Adani Ente	1,166	(4.9) %	5.3 %
Apollo Hos	3,098	3.8 %	7.0 %	Adani Port	815	(2.5) %	10.7 %
Motherson	214	3.6 %	1.8 %	Tata Consu	666	(1.3) %	2.4 %
Bandhan Ba	350	3.6 %	(0.3) %	Colgate-Pa	1,551	(1.1) %	(0.8) %

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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