



09 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,989	(2.5) %	(5.8) %
BSE SENSEX	37,577	(2.3) %	(3.3) %
CNX BANK	27,801	(3.5) %	(8.3) %
CNX MIDCAP	16,375	(2.4) %	(10.7) %
CNX SMALLCAP	5,441	(2.6) %	(19.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,865	(1.0) %	(9.4) %
S&P 500	2,972	(1.7) %	(8.0) %
FTSE 100	6,463	(3.6) %	(15.0) %
HANG SENG	26,147	(2.3) %	(8.4) %
NIKKEI	20,750	(2.7) %	(10.6) %
SHANGHAI COMPOSITE	3,035	(1.2) %	(1.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.61	0.1 %	3.4 %
EUR/USD	1.12	0.3 %	(0.4) %
GBP/USD	1.29	0.7 %	(2.1) %
USD/JPY	106.89	(0.5) %	(1.6) %
USD/AUD	1.51	(0.0) %	6.1 %
USD/SGD	1.39	(0.0) %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	41	(10.1) %	(32.5) %
Gold(INR/10g)	44,315	2.4 %	13.6 %
Gold Comex(USD/oz)	1,682	0.3 %	9.0 %
SILVER(INR/1Kg)	47,071	2.1 %	2.2 %
Aluminium(USD/MT)	1,687	(1.6) %	(4.8) %
Copper(USD/MT)	5,624	(0.8) %	(8.8) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.8	(0.2) %	(1.2) %

Global Economy: The US nonfarm payrolls surged by 273,000 jobs in February, indicating a sharp jump compared to addition of 225,000 jobs originally reported for the previous month. The US Commerce Department said the trade deficit narrowed to \$45.3 billion in January from a revised \$48.6 billion in December. The US wholesale inventories fell by 0.4% in January after slipping by a revised 0.3% in December. China's exports and imports both plunged over the first two months of the year, as the coronavirus tore through the world's second-largest economy. Exports crashed by 17.2% in January and February combined compared to the same period a year earlier, according to data released on Saturday by the General Administration of Customs. This was down from around 8% growth in December. Imports also dropped 4% from a year earlier, sharply down from 16.5% growth in December.

Global Equities: Dow ended down 1% to 25,864.78 after plummeting by nearly 900 points in early trading. Coronavirus worries stayed in place though markets also eyed the supportive US jobs data.

Indian Economy: The Reserve Bank of India has allayed fears of bank depositors and assured the safety of their deposits. Concern has been raised in certain sections of media about safety of deposits of certain banks. This concern is based on analysis which is flawed. Solvency of banks is internationally based on Capital to Risk Weighted Assets (CRAR) and not on market cap. RBI closely monitors all the banks and hereby assures all depositors that there is no such concern of safety of their deposits in any bank.

Equity Markets: Key benchmark indices crashed on Friday after Yes Bank was placed under a "moratorium", 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. Benchmark indices, however, trimmed losses in mid-afternoon after FM Nirmala Sitharaman assured that every depositor's money is safe in Yes Bank. The Nifty 50 index plummeted 289.45 points or 2.57% to 10,979.55, its lowest closing level since 19 September 2019. It fell as much as 441.60 points at the day's low of 10,827.40 in mid-morning trade.

Corporate News: Steel Authority of India Ltd is in talks with the Indian Railways for an order to supply about 15.5 lakh tonnes of rail in the next financial year, according to media reports. IT counters could see some buying on a deep slide in Indian Rupee. Indian Rupee fell sharply as a heavy slide continued in as local equities. Indian rupee has breached Rs 74 per dollar mark on Friday, 06 March 2020, its lowest level since October 2018. BPCL would be in focus as the government has invited bids for the sale of its entire 52.98% stake in Bharat Petroleum Corporation (BPCL).



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(305.4)	(193.5)	37.0
MF(INR cr)	1,124.3	645.8	280.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	46,523	47,474	37,699
F&O(INR cr)	844,569	1,822,630	1,427,524

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	41.9	36.8	15.7
NSE VIX	25.6	24.6	16.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,801	(3.5) %	(8.3) %	Energy	13,343	(2.9) %	(19.3) %
IT	15,663	(1.3) %	(1.1) %	Pharma	8,018	(1.6) %	(14.5) %
Metals	2,184	(4.4) %	(29.6) %	Finance	13,083	(2.9) %	4.7 %
Auto	6,895	(0.8) %	(18.1) %	PSU	1,795	(5.1) %	(47.0) %
FMCG	28,937	(2.0) %	(4.2) %	Real Estate	270	(2.9) %	1.0 %

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>
P & G Hygi	10,489	1.8 %	(2.8) %	Yes Bank	16	(56.1) %	(94.1) %
Pidilite I	1,654	1.5 %	32.0 %	Indiabulls	255	(10.8) %	(70.0) %
Maruti Suz	6,446	1.3 %	(5.8) %	Tata Motor	114	(9.2) %	(39.0) %
Bajaj Auto	2,735	1.2 %	(6.2) %	Piramal En	1,302	(8.8) %	(50.5) %
GAIL (Indi	108	0.9 %	(39.2) %	Vodafone I	3	(8.3) %	(81.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Housing Starts (FEB)	09-03-2020	17:45	CAD	-	-
Building Permits (MoM) (JAN)	09-03-2020	18:00	CAD	-	0.074
Unemployment Rate (FEB)	09-03-2020	12:15	CHF	-	0.026
Domestic Sight Deposits CHF (MAR 6)	09-03-2020	14:30	CHF	-	-
German Industrial Production n.s.a. and w.d.a. (YoY) (JAN)	09-03-2020	12:30	EUR	-	(0.068)
Eco Watchers Survey Current (FEB)	09-03-2020	10:30	JPY	-	41.9
Bank Lending Ex-Trusts (YoY) (FEB)	09-03-2020	5:20	JPY	-	0.02
BOJ Outright Bond Purchase 10~25 Year	09-03-2020	6:40	JPY	-	-
CPI (YoY) (FEB)	09-03-2020	17:30	MXN	-	0.0324
U.S. to Sell 13-Week Bills	09-03-2020	21:00	USD	-	-

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