



09 Apr.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,874	0.4 %	0.0 %
BSE SENSEX	49,746	0.2 %	(0.6) %
CNX BANK	32,783	(0.6) %	(3.2) %
CNX MIDCAP	24,462	0.5 %	1.4 %
CNX SMALLCAP	8,519	1.2 %	2.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,504	0.2 %	9.5 %
S&P 500	4,097	0.4 %	9.1 %
FTSE 100	6,942	0.8 %	5.6 %
HANG SENG	29,008	1.2 %	5.6 %
NIKKEI	29,709	(0.1) %	9.0 %
SHANGHAI COMPOSITE	3,483	0.1 %	(0.6) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.33	0.1 %	0.5 %
EUR/USD	1.18	0.4 %	(3.5) %
GBP/USD	1.39	(0.1) %	1.5 %
USD/JPY	110.10	(0.3) %	6.7 %
USD/AUD	1.31	(0.2) %	0.8 %
USD/SGD	1.34	(0.3) %	1.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	0.7 %	25.5 %
Gold(INR/10g)	46,189	0.8 %	(9.5) %
Gold Comex(USD/oz)	1,737	(0.5) %	(10.9) %
SILVER(INR/1Kg)	66,945	1.4 %	(2.8) %
Aluminium(USD/MT)	2,240	(0.3) %	11.2 %
Copper(USD/MT)	8,982	(0.0) %	13.4 %

**FIXED INCOME**

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

**Global Economy:** Federal Reserve Chair Jerome Powell said that the economic recovery remains uneven and incomplete. The world won't be able to fully resume economic activity until the virus is controlled everywhere, he said. First-time claims for US unemployment benefits increased in the week ended April 3rd, according to a report released by the Labor Department on Thursday. The report said initial jobless claims edged up to 744,000, an increase of 16,000 from the previous week's revised level of 728,000. Claims rose for a second week. Germany's factory orders grew 1.2% month-on-month in February, faster than the 0.8% increase in January, data from Destatis showed on Thursday. Excluding major orders, new orders in manufacturing were 1.5% higher than in the previous month. Domestic orders increased 4%, while foreign orders decreased 0.5% in February on the previous month. On a yearly basis, growth in industrial orders improved notably to 5.6% from 1.4% a month ago. UK construction Purchasing Managers' Index rose to 61.7 in March from 53.3 in February, survey data from IHS Markit showed on Thursday. This was the fastest expansion since September 2014. House building was the best-performing category, with growth the fastest since July 2020. Strong increases in activity were also seen in commercial construction and civil engineering in March. Both segments logged its highest growth since the second half of 2014. The survey showed that new orders also grew at the fastest pace since September 2014. Japan's consumer confidence rose to the highest level in thirteen months in March, data from the Cabinet Office showed on Thursday. On a seasonally adjusted basis, the consumer confidence index increased to 36.1 in March from 33.9 in February. The latest index was the highest since February last year, when it was 38.4.

**Global Equities:** The US stocks lingered around record highs amid some signs of stress as trend in economic recovery stayed in focus.

**Indian Economy:** The Federation of Automobile Dealers Associations (FADA) today released Monthly Vehicle Registration Data for March 21. March Auto Registrations continued to fall, sliding by 28.64% year on year (YoY) but recorded a rise of 10.05% month on month (MoM). Tractors and Passenger Vehicles registrations grew 29.21% and 28.39% YoY though the spurt was on a low base. On YoY basis, 2 wheelers, 3 wheelers and commercial vehicles registrations fell by 35.26%, 50.72% and 42.20% respectively. On MoM basis 2 wheelers, 3 wheelers, commercial vehicles, passenger vehicles and tractors registrations grew by 9.54%, 14.15%, 14.15%, 10.11% and 12.60% respectively. There was no significant change in Dealer inventory days as PV & 2W inventory remained in the range of 10-15 and 30-35 days. FADA noted that the second wave of Covid is not only spreading faster but is also trying to destabilize the growth which India has been able to achieve in last few months.

**Equity Markets:** The domestic equity benchmarks ended with minor gains after a volatile day on Thursday. Metal stocks surged while banks and financials corrected. The Nifty closed below the 14,900 mark.

**Corporate News:** Ministry of Road Transport and Highways has sanctioned 28 Projects of 231.04 Km worth 1210.17 Cr for the state of Uttarakhand, according to the road transport and highways minister. Srei Equipment Finance said it had received an expression of interest for up to \$250 million capital infusion in the company from international PE funds. The international private equity funds are US-based Arena Investors LP and Singapore's Makara Capital Partners. CEAT said it had entered into a Third Addendum Agreement to the existing Share Subscription and Shareholders' Agreement with Tyresmore Online Private Limited, an associate of the company and other parties, for making a future investment of up to Rs 2.4 crore in Tyresmore, to acquire additional 3.47% of the post issue total share capital of Tyresmore.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	54.3	(51.5)	(51.5)
MF(INR cr)	(63.2)	(134.3)	(134.3)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	78,096	55,234	55,234
F&O(INR cr)	8,504,305	5,337,091	5,337,091

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.2	18.0	18.0
NSE VIX	20.3	20.5	20.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,783	(0.6) %	(3.2) %	Energy	18,276	(0.3) %	(1.3) %
IT	27,148	1.2 %	4.5 %	Pharma	12,612	(0.0) %	1.9 %
Metals	4,495	3.9 %	7.3 %	Finance	15,525	(0.3) %	(2.4) %
Auto	9,959	0.2 %	(0.6) %	PSU	2,146	(0.9) %	(3.1) %
FMCG	34,983	0.4 %	0.3 %	Real Estate	334	0.8 %	(0.5) %

### 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	614	9.2 %	20.7 %	Adani Tran	1,002	(5.0) %	0.3 %
Tata Steel	918	5.0 %	6.4 %	Adani Gree	1,166	(2.6) %	0.5 %
Indus Towe	264	4.6 %	3.2 %	Abbott Ind	14,963	(2.3) %	(0.1) %
Shree Ceme	31,583	4.5 %	5.4 %	SBI Cards	957	(2.0) %	(1.8) %
Indraprast	526	4.1 %	(0.1) %	ICICI Lomb	1,431	(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>
<b>No Data Found</b>					

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