



10 Mar.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,098	1.0 %	82.9 %
BSE SENSEX	51,025	1.2 %	80.5 %
CNX BANK	35,866	1.7 %	97.0 %
CNX MIDCAP	24,024	(0.5) %	109.4 %
CNX SMALLCAP	8,324	(1.0) %	135.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,833	0.1 %	4.0 %
S&P 500	3,875	1.4 %	3.2 %
FTSE 100	6,730	0.2 %	2.4 %
HANG SENG	28,773	0.8 %	4.7 %
NIKKEI	29,028	1.0 %	6.5 %
SHANGHAI COMPOSITE	3,359	(1.8) %	(4.1) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.06	0.3 %	0.1 %
EUR/USD	1.19	(1.0) %	(2.9) %
GBP/USD	1.38	(0.8) %	1.3 %
USD/JPY	108.39	0.9 %	5.1 %
USD/AUD	1.30	1.2 %	0.3 %
USD/SGD	1.34	0.7 %	1.6 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	(3.1) %	34.4 %
Gold(INR/10g)	44,451	0.2 %	(12.9) %
Gold Comex(USD/oz)	1,718	2.1 %	(11.9) %
SILVER(INR/1Kg)	65,934	1.0 %	(4.3) %
Aluminium(USD/MT)	2,141	(0.5) %	6.3 %
Copper(USD/MT)	8,895	(1.1) %	12.3 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.1) %	0.6 %

**Global Economy:** A US recovery turbocharged by president Joe Biden's stimulus package will help power a faster than expected global economic upswing that risks leaving Europe behind, according to OECD. The Paris-based organisation said it now expects global output to rise above pre-pandemic levels by mid-2021 after major economies showed greater resilience at the end of 2020, and as evidence of vaccine efficacy grows and governments add extra demand stimulus. OECD raised its world growth forecast for 2021 to 5.6% from 4.2% and more than doubled its prediction for the US to 6.5%. OECD models indicate that Biden's measures will raise output around 3% to 4% on average in the first full year of the package. Germany's exports grew by 1.4% month-on-month in January, faster than the 0.4% rise in December, data from Destatis revealed on Tuesday. At the same time, imports decreased 4.7% after staying flat in the previous month. As a result, the trade surplus rose to a seasonally adjusted EUR 22.2 billion from EUR 16.4 billion in the prior month. On a yearly basis, exports decreased 8% and imports dropped 9.8%. The trade surplus, on an unadjusted basis, increased to EUR 14.3 billion from EUR 13.7 billion in the same period last year. UK retail sales recovered in February as Prime Minister's roadmap to reopening prompted a surge in spending on non-food items, the British Retail Consortium said Tuesday. Total retail sales grew 1% on a yearly basis in February and like-for-like sales advanced 9.5%. Japan's gross domestic product rose an annualized 11.7% in the fourth quarter of 2020, the Cabinet Office said on Tuesday. This followed the 22.9% rise in the three months prior. On a quarterly basis, gross domestic product gained 2.8% - and down from 5.3% in the previous three months. Australia's business confidence index advanced to 16 in February from 12 in January, survey results from the National Australia Bank showed Tuesday. This was the highest reading since early 2010.

**Global Equities:** The US stocks jumped on upbeat global economic outlook. NASDAQ roared after recent losses.

**Indian Economy:** The Organisation for Economic Co-operation and Development (OECD) on Tuesday forecast India's GDP grow at 12.6% in FY22, the highest among G20 countries. The recovery in activity continued in the fourth (December) quarter of 2020, despite new virus outbreaks in many economies and tighter containment measures. NITI Aayog and Rocky Mountain Institute (RMI) India released a new report 'Mobilising Electric Vehicle Financing in India', which highlights the role of finance in the India's transition to electric vehicles (EVs) and analyses that the transition will require a cumulative capital investment of USD 266 billion (Rs 19.7 lakh crore) in EVs, charging infrastructure, and batteries over the next decade. The report also identifies a market size of USD 50 billion (Rs 3.7 lakh crore) for the financing of EVs in 2030—about 80% of the current size of India's retail vehicle finance industry.

**Equity Markets:** Key equity benchmarks surged to end near the day's high on Tuesday, led by rally in banks and financials shares. The Nifty closed a tad above the 15,000 mark. Metals and pharma shares corrected. Sellers outnumbered buyers. On the BSE, 1266 shares rose and 1729 shares fell. A total of 198 shares were unchanged.

**Corporate News:** Auto stocks will be in focus. According to the Federation of Automobile Dealers Associations (FADA), new vehicle registrations in India dropped by 13.43% from 17,31,628 units in February 2020 to 14,99,036 units last month. Larsen & Toubro on Tuesday said it has despatched a 700 MWe steam generator for Gorakhpur Haryana Anu Vidyut Pariyojana ahead of schedule.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(164.7)	97.6	154.6
MF(INR cr)	(864.4)	(312.2)	(541.9)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	75,756	78,302	62,865
F&O(INR cr)	4,687,496	4,399,414	2,473,170

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.0	25.3	28.1
NSE VIX	22.5	0	0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,866	1.7 %	97.0 %	Energy	19,385	(1.3) %	80.0 %
IT	25,582	0.9 %	112.4 %	Pharma	12,134	(0.9) %	72.7 %
Metals	3,803	(2.5) %	144.8 %	Finance	16,650	2.2 %	86.2 %
Auto	10,464	(0.4) %	124.7 %	PSU	2,356	(1.0) %	83.6 %
FMCG	33,216	0.1 %	26.0 %	Real Estate	350	(1.1) %	103.4 %

### 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>
SBI Life I	971	5.1 %	52.9 %	NMDC	132	(4.8) %	67.5 %
Kotak Mah.	1,979	3.3 %	67.5 %	Adani Tran	758	(4.6) %	300.0 %
HDFC Bank	1,563	2.8 %	88.3 %	B P C L	446	(4.5) %	47.2 %
ICICI Bank	625	2.8 %	100.9 %	Tata Steel	707	(4.1) %	165.3 %
H D F C	2,577	2.7 %	62.8 %	Hindustan	298	(3.7) %	85.5 %

### 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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