



11 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,451	(4.9) %	(10.4) %
BSE SENSEX	35,635	(5.2) %	(8.3) %
CNX BANK	26,463	(4.8) %	(12.7) %
CNX MIDCAP	15,633	(4.5) %	(14.7) %
CNX SMALLCAP	5,170	(5.0) %	(23.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,018	4.9 %	(12.3) %
S&P 500	2,882	4.9 %	(10.8) %
FTSE 100	5,960	(0.1) %	(21.6) %
HANG SENG	25,393	1.4 %	(11.0) %
NIKKEI	19,867	0.9 %	(14.4) %
SHANGHAI COMPOSITE	2,997	1.8 %	(2.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.38	1.0 %	4.5 %
EUR/USD	1.14	2.2 %	1.9 %
GBP/USD	1.31	1.5 %	(0.6) %
USD/JPY	102.50	(4.1) %	(5.7) %
USD/AUD	1.52	0.4 %	6.5 %
USD/SGD	1.38	(0.2) %	2.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	34	(16.8) %	(43.8) %
Gold(INR/10g)	43,750	(1.3) %	12.2 %
Gold Comex(USD/oz)	1,663	(1.1) %	7.8 %
SILVER(INR/1Kg)	45,854	(2.6) %	(0.4) %
Aluminium(USD/MT)	1,689	0.1 %	(4.7) %
Copper(USD/MT)	5,598	(0.5) %	(9.2) %

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	0.0 %	(1.1) %

Global Economy: China's consumer price inflation slowed slightly in February on slowing non-food price growth and producer prices returned to deflation as factory shutdowns after corona virus outbreak lowered demand. Consumer prices rose 5.2% on a yearly basis in February, slower than the 5.4% increase seen in January, data published by the National Bureau of Statistics showed Tuesday. The euro area economy expanded at a slower pace as initially estimated at the end of 2019 driven by weaker consumption and exports, a revised estimate published by Eurostat revealed on Tuesday. Gross domestic product in the 19-nation bloc rose 0.1% sequentially, following third quarter's 0.3% expansion. The rate matched the estimate published on February 14. Australia business confidence and conditions weakened in February. National Australia Bank business conditions index fell two points to zero in February, led by a decline in profitability and small decline in trading conditions.

Global Equities: Some recovery emerged in global stocks after the carnage on Monday as hopes of targeted economic stimulus boosted sentiments. Global markets saw their biggest falls since the 2008 financial crisis on Monday.

Indian Economy: Moody's Investors Service on Monday cut its growth forecast for India to 5.3% for 2020 from 5.4% earlier, as it expects the coronavirus outbreak to dampen domestic demand globally.

Equity Markets: Domestic shares plummeted on Monday (9 March 2020) as panic gripped financial markets amid the double threat of a coronavirus-driven global recession and an oil-price war. The barometer index, the S&P BSE Sensex, tanked 1,941.67 points or 5.17% at 35,634.95. The Nifty 50 index slumped 538 points or 4.90% at 10,451.45. Global stock markets witnessed a selloff amid a plunge in crude oil prices.

Corporate News: Tata Consultancy Services (TCS) on Tuesday said its board has approved payment of an interim dividend of Rs 12 per share for the financial year 2019-20. Wonderla Holidays said that in view of the emerging situation in the State of Kerala, consequent to the reported Corona Virus cases, the Company has decided to temporarily close the Kochi Park from 11th March to 20th March, 2020.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(472.5)	(249.3)	34.8
MF(INR cr)	1,242.1	734.1	284.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	55,721	48,848	37,776
F&O(INR cr)	1,170,648	1,713,967	1,426,417

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	47.3	38.5	15.9
NSE VIX	30.8	25.6	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	26,463	(4.8) %	(12.7) %	Energy	12,480	(6.5) %	(24.5) %
IT	14,855	(5.2) %	(6.2) %	Pharma	7,756	(3.3) %	(17.3) %
Metals	2,020	(7.5) %	(34.9) %	Finance	12,522	(4.3) %	0.2 %
Auto	6,632	(3.8) %	(21.2) %	PSU	1,688	(5.9) %	(50.1) %
FMCG	28,057	(3.0) %	(7.1) %	Real Estate	260	(3.6) %	(2.7) %

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>
Yes Bank	21	31.6 %	(92.3) %	Indiabulls	214	(16.1) %	(74.8) %
Vodafone I	4	21.2 %	(77.5) %	O N G C	75	(15.8) %	(52.6) %
H P C L	213	5.7 %	(25.1) %	Vedanta	95	(14.5) %	(49.8) %
B P C L	424	5.1 %	8.2 %	Reliance I	1,114	(12.3) %	(20.0) %
Bharti Inf	211	3.6 %	(32.9) %	Zee Entert	194	(12.1) %	(55.0) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA's Debelle Gives Speech in Sydney	11-03-2020	3:30	☐AUD	-	-
Westpac Consumer Confidence (MAR)	11-03-2020	5:00	☐AUD	-	0.023
Home Loans Value (MoM) (JAN)	11-03-2020	6:00	☐AUD	-	0.044
Capacity Utilization Rate (4Q)	11-03-2020	18:00	☐CAD	-	0.817
Construction Output (YoY) (JAN)	11-03-2020	15:00	☐GBP	-	0.05
U.K. Government Announces 2020 Budget	11-03-2020	17:00	☐GBP	-	-
BOJ Outright Bond Purchase 5~10 Years	11-03-2020	6:40	☐JPY	-	-
Card Spending Retail (MoM) (FEB)	11-03-2020	3:15	☐NZD	-	(0.001)
MBA Mortgage Applications (MAR 6)	11-03-2020	16:30	☐USD	-	0.151
DOE U.S. Crude Oil Inventories (MAR 6)	11-03-2020	20:00	☐USD	-	-
U.S. to Sell USD24 Bln 10-Year Notes Reopening	11-03-2020	22:30	☐USD	-	-
Monthly Budget Statement (FEB)	11-03-2020	23:30	☐USD	-	-

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