



12 Mar.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,458	0.1 %	(10.4) %
BSE SENSEX	35,697	0.2 %	(8.2) %
CNX BANK	26,488	0.1 %	(12.7) %
CNX MIDCAP	15,495	(0.9) %	(15.5) %
CNX SMALLCAP	5,164	(0.1) %	(23.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,553	(5.9) %	(17.5) %
S&P 500	2,741	(4.9) %	(15.1) %
FTSE 100	5,877	(1.4) %	(22.7) %
HANG SENG	25,232	(0.6) %	(11.6) %
NIKKEI	19,416	(2.3) %	(16.3) %
SHANGHAI COMPOSITE	2,969	(0.9) %	(3.8) %

**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)	43,427	(0.7) %	11.4 %
Gold Comex(USD/oz)	1,663	(1.1) %	7.8 %
SILVER(INR/1Kg)	45,980	0.3 %	(0.2) %
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:** The US Labor Department said its consumer price index inched up by 0.1% in February, matching the uptick seen in January. China's consumer price inflation advanced 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. Food prices surged 21.9% due to sharp 135.2% increase in pork prices. At the same time, non-food prices climbed only 0.9%. The sudden outbreak of corona virus had a complicated impact on the price trend, the NBS said in a statement. The increase in food prices reflects transportation control implemented across the country. The Bank of England (BOE) has cut the UK interest rates to protect the British economy from the impact of the coronavirus. In an unscheduled move, the BOE trimmed interest rates to 0.25%, from 0.75%. It stated that following the spread of Covid-19, risky asset and commodity prices have fallen sharply, and government bond yields reached all-time lows, consistent with a marked deterioration in risk appetite and in the outlooks for global and UK growth. BOE noted that indicators of financial market uncertainty have reached extreme levels. UK economy stagnated in January, data from the Office for National Statistics revealed Wednesday. Gross domestic product remained flat on month in January after rising 0.3% in December. The growth in the dominant service sector eased to 0.1% in January from 0.3% in December. Australia's consumer confidence dropped to a five-year low. The Westpac-Melbourne Institute Index of Consumer Sentiment declined to 91.9 in March from 95.5 in February.

**Global Equities:** The DOW tanked nearly 6% as World Health Organization called the new coronavirus outbreak a pandemic.

**Indian Economy:** The net Assets under Management (AUM) of the mutual fund (MF) industry declined by 2.3% (by Rs 0.63 lakh crore) to Rs 27.23 lakh crore in February 2020 over January 2020. The average net AUM of the industry grew by 0.3% (by Rs 0.10 lakh crore) to Rs 28.29 lakh crore in February 2020 compared with January 2020. Net outflows in the industry stood at Rs 0.02 lakh crore in February 2020, against net inflows of Rs 1.20 lakh crore in January 2020. The overall mutual fund folios increased 0.3% to 888.4 lakh end February 2020 over 885.3 lakh end January 2020. While expressing confidence in the Indian economy, D K Aggarwal, President, PHD Chamber of Commerce and Industry said in a press statement that the volatility in the rupee and stock markets is short lived and is majorly driven by the spread of Coronavirus disease (COVID) in many countries.

**Equity Markets:** Domestic equity benchmarks ended with small gains after a volatile session on Wednesday. The Nifty, however, failed to close above the 10,500 mark. Despite the bounce back in the crude prices so far in the week, investors remained wary of the ongoing price war between Saudi Arabia and Russia. Investors continued to worry about the unabating spread of the coronavirus. The barometer index, the S&P BSE Sensex, rose 62.45 points or 0.18% at 35,697.40. The Nifty 50 index shed 2.55 points or 0.02% at 10,448.90.

**Corporate News:** IT counters could see some pressure on surge in Indian Rupee. INR jumped on bargain buying after falling near 14 month low earlier this week. INR closed at 73.62 per dollar mark, adding 55 paise on the day. State Bank of India has decided to waive maintenance of Average Monthly Balance (AMB) for all Savings Bank Accounts. PNC Infratech Ltd on Wednesday said it has bagged orders worth Rs 3,582 crore from the National Highways Authority of India (NHAI) for widening of road projects in Uttar Pradesh. Biocon said the company has won a US court ruling that invalidated a Sanofi patent on the insulin Glargine, removing a key legal hurdle for commercialization of the product Semglee co-developed with Mylan, in the US.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(948.2)	(365.8)	30.6
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)	53,901	49,570	37,845
F&O(INR cr)	1,425,247	1,672,721	1,426,412

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	47.3	38.5	15.9
NSE VIX	31.6	26.5	16.6

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,488	0.1 %	(12.7) %	Energy	12,399	(0.7) %	(25.0) %
IT	14,681	(1.2) %	(7.3) %	Pharma	7,623	(1.7) %	(18.7) %
Metals	1,987	(1.6) %	(36.0) %	Finance	12,560	0.3 %	0.5 %
Auto	6,568	(1.0) %	(21.9) %	PSU	1,636	(3.1) %	(51.7) %
FMCG	28,079	0.1 %	(7.0) %	Real Estate	255	(1.8) %	(4.5) %

## 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>
Yes Bank	29	35.5 %	(89.6) %	GAIL (Indi)	91	(9.9) %	(49.0) %
Vodafone I	4	8.7 %	(75.5) %	Indiabulls	196	(8.5) %	(76.9) %
Zee Entert	210	7.7 %	(51.5) %	Tata Steel	300	(7.0) %	(44.0) %
Bharti Inf	225	6.5 %	(28.5) %	Tata Motor	99	(6.4) %	(47.2) %
Coal India	168	6.4 %	(28.9) %	Tata Motor	44	(5.5) %	(52.9) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Consumer Inflation Expectation (MAR)	12-03-2020	5:30	☐AUD	-	0.04
Euro-Zone Industrial Production w.d.a. (YoY) (JAN)	12-03-2020	15:30	☐EUR	-	(0.041)
ECB Deposit Facility Rate (MAR 12)	12-03-2020	18:15	☐EUR	-	(0.005)
RICS House Price Balance (FEB)	12-03-2020	5:31	☐GBP	-	0.17
BSI Large All Industry (QoQ) (1Q)	12-03-2020	5:20	☐JPY	-	(6.2)
Tokyo Avg Office Vacancies (FEB)	12-03-2020	7:30	☐JPY	-	1.53
Continuing Claims (FEB 29)	12-03-2020	18:00	☐USD	-	-
EIA Natural Gas Storage Change (MAR 6)	12-03-2020	20:00	☐USD	-	(109)
U.S. to Sell 4-Week Bills	12-03-2020	21:00	☐USD	-	-
Household Change in Net Worth (4Q)	12-03-2020	21:30	☐USD	-	-
U.S. to Sell USD16 Bln 30-Year Bond Reopening	12-03-2020	22:30	☐USD	-	-

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