



12 Mar.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,175	0.5 %	83.9 %
BSE SENSEX	51,280	0.5 %	81.4 %
CNX BANK	35,938	0.2 %	97.4 %
CNX MIDCAP	24,220	0.8 %	111.1 %
CNX SMALLCAP	8,439	1.4 %	138.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	32,486	0.6 %	6.1 %
S&P 500	3,939	1.0 %	4.9 %
FTSE 100	6,737	0.2 %	2.5 %
HANG SENG	29,386	1.7 %	7.0 %
NIKKEI	29,212	0.6 %	7.2 %
SHANGHAI COMPOSITE	3,437	2.4 %	(1.9) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.95	(0.4) %	(0.0) %
EUR/USD	1.19	0.0 %	(3.1) %
GBP/USD	1.39	0.3 %	1.6 %
USD/JPY	108.81	0.2 %	5.5 %
USD/AUD	1.30	(0.2) %	0.3 %
USD/SGD	1.35	(0.1) %	1.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	2.5 %	38.6 %
Gold(INR/10g)	44,478	0.0 %	(12.8) %
Gold Comex(USD/oz)	1,726	(0.2) %	(11.4) %
SILVER(INR/1Kg)	66,172	0.0 %	(3.9) %
Aluminium(USD/MT)	2,159	0.4 %	7.2 %
Copper(USD/MT)	9,063	1.4 %	14.4 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	0.6 %

**Global Economy:** The US Labor Department said initial jobless claims dropped to 712,000, a decrease of 42,000 from the previous week's revised level of 754,000. This was the lowest level in last four months. The European Central Bank said Thursday that it will step up its emergency bond purchases over the next quarter based on market conditions and left its key interest rates unchanged. The Governing Council, led by ECB President Christine Lagarde, left the size of the pandemic emergency purchase program, or PEPP, unchanged at EUR 1,850 billion and said these will continue until at least the end of March 2022 or when the Covid-19 crisis phase is over. China's bank lending rose in February, data from the People's Bank of China revealed on Wednesday. Banks extended CNY 1.36 trillion in local currency loans in February. However, lending declined from a record CNY 3.58 trillion in January. Total social financing totaled CNY 1.71 trillion compared to CNY 5.17 trillion in the previous month. British house prices increased again in February but the current lockdown restrictions weighed on the sales market activity, the Residential Market Survey from the Royal Institution of Chartered Surveyors, or RICS, showed on Thursday. The house price balance rose to 52% in February from 49% in previous month.

**Global Equities:** The S&P and Dow hit record highs on Thursday amid excellent buying as hopes of continued monetary and fiscal support boosted sentiments.

**Indian Economy:** The Federation of Automobile Dealers Associations (FADA) has released Monthly Vehicle Registration Data for February 21. February'21 Registration. The overall auto Registrations continued to fall in double digits by -13.43% YoY in the month of February. Tractor sales continued positive momentum by growing 18.89% YoY while Passenger Vehicles also showed double digit growth at 10.59% YoY. This growth was majorly due to low base of last year as India had started transitioning from BS-4 to BS-6 emission norms. On a YoY basis, 2W, 3W and CV continued their fall by -16.08%, -49.65% and -29.53% respectively. Passenger vehicle waiting period continued to remain as high as 8 months as scarcity of semiconductors continued to linger around. Dealer inventory for PV and 2W remained in range of 10-15 and 30-35 days. Auto Retail Industry continues to await the fine prints of Voluntary Scrappage Policy.

**Equity Markets:** The domestic equity benchmarks ended with decent gains after a volatile day on Wednesday. Metal, IT, pharma, auto and FMCG shares advanced. The Nifty closed above the 15,150 mark. The broader market was trading firm. The S&P BSE Mid-Cap index added 0.77% while the S&P BSE Small-Cap index rose 0.95%.

**Corporate News:** IDBI Bank has been taken out of Prompt Corrective Action (PCA) framework by the RBI. The bank has provided a written commitment that it would comply with the norms of minimum regulatory capital, net NPA and leverage ratio on an ongoing basis. NBCC India received contracts for construction of cooling tower (NDCT) CT-1, 3 and 5 for Yadadri Thermal Power Station, (5x800 MW) owned by Telangana State Power Generation Corporation. India's fuel consumption fell for the second month in a row in February to its lowest since September last year. Consumption of fuel, a proxy for oil demand, fell 4.9% to 17.2 million tonnes year-on-year in February, data from the Petroleum Planning and Analysis Cell (PPAC) of the Ministry of Petroleum & Natural Gas showed on Thursday.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	365.3	135.8	155.5
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)	58,301	75,802	62,846
F&O(INR cr)	7,255,789	4,756,461	2,493,435

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.9	24.6	28.0
NSE VIX	20.8	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	35,938	0.2 %	97.4 %	Energy	19,331	(0.3) %	79.5 %
IT	26,010	1.7 %	115.9 %	Pharma	12,313	1.5 %	75.2 %
Metals	3,874	1.9 %	149.3 %	Finance	16,690	0.2 %	86.6 %
Auto	10,559	0.9 %	126.7 %	PSU	2,352	(0.2) %	83.3 %
FMCG	33,403	0.6 %	26.7 %	Real Estate	352	0.6 %	104.7 %

### 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>
L & T Info	4,129	6.0 %	196.6 %	Adani Tran	733	(3.2) %	287.0 %
Biocon	403	3.5 %	44.6 %	SBI Life I	941	(3.1) %	48.1 %
Muthoot Fi	1,305	3.4 %	115.9 %	SBI Cards	1,027	(2.6) %	69.0 %
JSW Steel	414	3.1 %	189.5 %	O N G C	114	(2.0) %	74.0 %
Eicher Mot	2,672	3.1 %	105.5 %	Petronet L	247	(1.8) %	23.3 %

### 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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