



13 Apr.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,112	4.2 %	10.4 %
BSE SENSEX	31,160	4.2 %	10.2 %
CNX BANK	19,914	5.1 %	9.4 %
CNX MIDCAP	12,554	3.4 %	9.4 %
CNX SMALLCAP	3,822	3.9 %	8.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,719	1.2 %	(16.9) %
S&P 500	2,790	1.5 %	(13.6) %
FTSE 100	5,843	2.9 %	(23.2) %
HANG SENG	24,300	1.4 %	(14.9) %
NIKKEI	19,346	(0.0) %	(16.6) %
SHANGHAI COMPOSITE	2,826	0.4 %	(8.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.65	(0.1) %	6.2 %
EUR/USD	1.09	0.3 %	(2.9) %
GBP/USD	1.24	0.6 %	(5.8) %
USD/JPY	108.73	(0.1) %	0.1 %
USD/AUD	1.59	(1.4) %	11.8 %
USD/SGD	1.42	(0.4) %	5.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	23	(9.3) %	(62.8) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,740	3.4 %	12.8 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,429	0.5 %	(19.4) %
Copper(USD/MT)	4,964	(0.3) %	(19.5) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	(0.1) %	(1.2) %

**Global Economy:** The US Labor Department said its consumer price index slid by 0.4% in March after rising by 0.1% for two straight months. US Federal Reserve Chair Jerome Powell said he expects a robust economic recovery once the spread of the virus is under control. Consumer prices in China were up 4.3% on year in March, down sharply from 5.2% in February. Eurozone finance ministers agreed an emergency plan to mitigate the downturn caused by the coronavirus pandemic after marathon discussions, on Thursday. UK economy would be plunged into a severe recession in the second quarter if the lockdown imposed to slow the spread of the coronavirus, or Covid-19, pandemic continues, the National Institute of Economic and Social Research said on Thursday. The think tank predicted 5 percent decline in economic growth in March quarter.

**Global Equities:** US stocks jumped in last session as Federal Reserve came up with additional actions to support the economy. Meanwhile, US Labor Department said 6.606 million people filed for unemployment last week, a decrease of 261,000 from the previous week's upwardly revised level of 6.867 million.

**Indian Economy:** India's factory output rose to a seven-month high of 4.5% in February, before the government imposed a nationwide lockdown in March that has crippled normal economic activity. The World Bank stated in update that Indian economy is likely to slow down this fiscal (2020-21) with growth rate in the 1.5-2.8%, The GDP growth is estimated at 5% or even lower during fiscal year 2019-20.

**Equity Markets:** Domestic shares surged on Thursday, tracking gains in global peers amid hopes that governments will roll out more stimulus measures to support their economies. Initial signs of peaking out of Covid-19 infections in major hotspots like Italy and the US also supported buying. The trading was volatile due to expiry of weekly index options on NSE. The barometer index, the S&P BSE Sensex, surged 1265.66 points or 4.23% at 31,159.62. The Nifty 50 index soared 363.15 points or 4.15% at 9,111.90.

**Corporate News:** Dr Reddy's Labs said its API manufacturing plant 5 at Miryalaguda, Telangana received Establishment Inspection Report (EIR) from USFDA. Bharat Dynamic recorded a turnover of Rs 3,095 crore (provisional) for FY21 against Rs 3,069 crore in previous year. Order book of the company as on April 1 stood at Rs 7,413 crore (provisional). As per the Association of Mutual Funds in India (AMFI) data, the equity inflows stood at Rs 11,485 cr in March. The inflow into equity mutual funds stood at a one-year high in March despite downfall in the stock market due to the Covid-19. The balanced fund outflows in March stood at Rs 1,515.6 cr as against Rs 1,182 cr outflow in February. Net inflows into equity mutual funds jumped by Rs 11,723 cr in March vs. Rs 10,795 cr in February. Meanwhile, the total number of SIP folios rose 2.47 lakh to 3.12 cr.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	273.6	37.1	37.1
MF(INR cr)	(2,292.6)	(867.8)	(867.8)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	54,163	41,010	41,010
F&O(INR cr)	1,788,472	1,080,581	1,080,581

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	43.4	48.3	48.3
NSE VIX	49.8	53.8	53.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,914	5.1 %	9.4 %	Energy	11,987	2.6 %	11.3 %
IT	12,729	1.9 %	5.7 %	Pharma	8,800	4.6 %	25.2 %
Metals	1,705	5.0 %	9.8 %	Finance	9,803	6.1 %	9.6 %
Auto	5,568	10.4 %	19.6 %	PSU	1,302	3.3 %	1.5 %
FMCG	28,953	0.4 %	9.8 %	Real Estate	186	2.9 %	7.9 %

### 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>
Motherson	66	17.5 %	14.0 %	Hind. Unil	2,372	(3.6) %	8.8 %
M & M	381	16.9 %	39.8 %	Tech Mahin	545	(2.4) %	6.7 %
Shriram Tr	676	13.5 %	8.7 %	Dr Reddy's	3,622	(1.7) %	17.0 %
Maruti Suz	5,327	13.4 %	25.4 %	IndusInd B	395	(0.9) %	15.5 %
Tata Motor	34	13.2 %	14.4 %	HDFC Life	472	(0.9) %	9.9 %

### 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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